

TREXIN CASE STUDY

ENHANCING THE WEALTH MANAGEMENT EXPERIENCE FOR FAMILY OFFICES

Trexin helped a VC group deploy a new fintech platform in 4 weeks.

BUSINESS DRIVER

Our Client, a venture capital team focused on seed- and early-stage fintech investments with high growth potential, observed that there was a noticeable lack of modern, digital platforms for wealth management and financial administration specifically tailored to the needs of U.S.-based family offices of ultra-high-net-worth individuals and families. Recognizing an opportunity to capture a significant first-mover advantage if an innovative solution could be quickly deployed, our Client identified a wealth management firm outside the U.S. that had recently developed their own digital platform and was willing to sell a copy of that codebase to our Client with no restrictions on its use. To get the platform to market as quickly as possible, our Client asked Trexin to help them “lift and shift” the software into a public cloud environment under their own control and reconfigure the platform for production readiness.

APPROACH

Applying an iterative, checkpoint-driven implementation style with an aggressive 4-week completion target, Trexin’s first milestone was a **preliminary lift and shift** comprising:

1. **Discovery and code read-in**, to verify builds from the Git repository, inventory services and dependencies, map configuration and secrets, and confirm the database schema against the provided DDL.
2. **Environment setup in Amazon Web Services (AWS)**, to establish networking, identity access management, runtime, database, storage, and continuous integration with repeatable deployment scripts.
3. **U.S. readiness with banking account integration**, to configure U.S. local defaults, authentication settings, and connect Plaid Link and webhooks in a sandbox environment.
4. **Stabilize and document**, including smoke tests for the primary customer journeys, basic centralized logging and alerts, and a concise runbook for deploy and rollback.

Trexin’s second milestone then shifted to **production readiness**, which included the design, development, testing, and deployment of must-have functional enhancements and the overall validation of system performance and scalability.

RESULTS

Trexin successfully completed the project in 4 weeks, providing our Client with a working, U.S. production-ready environment it fully owned and controlled, allowing it to immediately begin demoing the end-to-end core flows for family office wealth management. This ultimately led to a faster U.S. market entry, reduced technical uncertainty, and a foundation that supported investor, client, and partner confidence.

CASE STUDY

Production-ready in four weeks

4 weeks, start to production

THE APPROACH
Lift & shift to AWS

- 1** WEEK 1
Discovery & code read-in
- 2** WEEK 2
AWS environment setup
- 3** WEEK 3
U.S. readiness + Plaid
- 4** WEEK 4 - PRODUCTION
Stabilize & go live

THE RESULTS
Faster U.S. market entry

TIME TO PRODUCTION 4 weeks	OWNERSHIP Customer AWS
SPEED First to market	CONFIDENCE Investor trust

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