



Industries / Finance

A renowned financial services dealer group

OUR CORE VALUES: PASTA - P = Passion, A = Appreciation, S = Simplicity, T = Trust, A = Accountability

Customer Overview

A renowned financial services dealer group

The client is a financial services dealer group that provides tools and resources to accountants, referral partners, financial advisers and credit representatives for development of lucrative and successful business partnerships.

Client is dedicated to providing highest quality of financial planning advice and credit assistance to people.



Problem Statement

Easy and Organized Management of Information

Client wanted a solution where different stakeholders can easily store and manage data.

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CIS Solution

Seamless Storage and Management of Data

Financial planners can use this application to maintain records and information about their clients in a systematic order. The software can be used to store information about the clients to whom loan has been sanctioned. Admin creates the login information for financial

planner and provides the same to the planner and then the financial planner can add all the client data.

Positive Outcome

The application helps financial advisers to build and maintain strong and profitable business partnerships with their clients and thus grow their business.

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Technologies Used

MVC4
for Architecture

jQuery
write less, do more.



Our Achievements



12+

YEARS
IN BUSINESS



05

WORLDWIDE
OFFICES



600+

EXPERT
TEAMS



10+

WEB
EXPERIENCE



5+

MOBILE
EXPERIENCE



5+

MARKETING
EXPERIENCE



2100+

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