

Wealth Management Platform

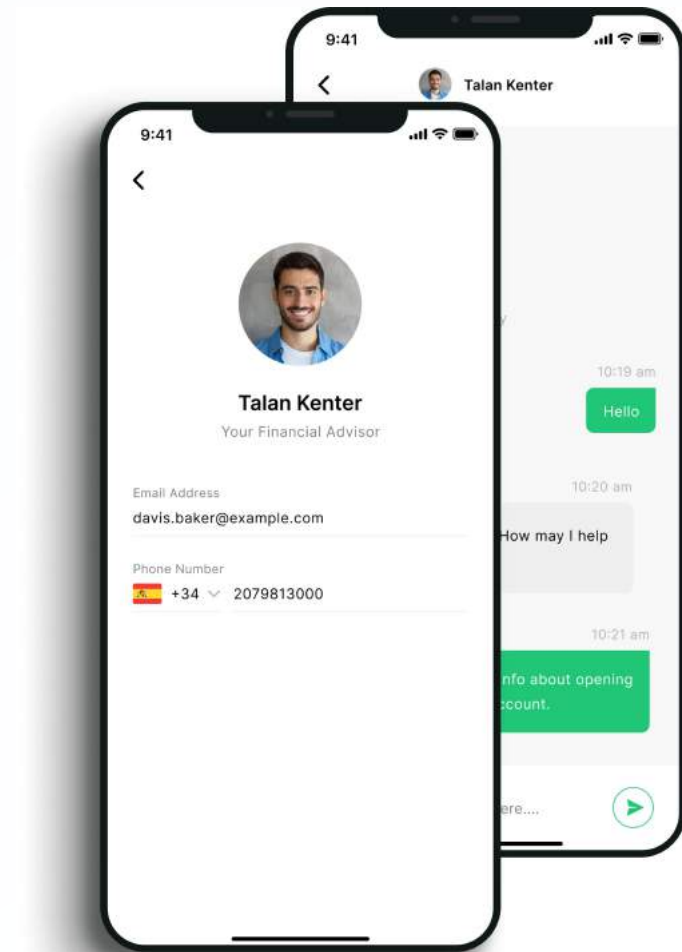
Advanced wealth management and brokerage platform built with Velmie banking technology

Introduction

TAPP Engine provides embedded digital wealth Infrastructure with cloud-native services. The platform comes with vertically integrated assets servicing infrastructure that combines modern brokerage, custody, clearing & cash management, designed to help financial intermediaries. The users of the clients' platform are individuals and members of their families, business owners, and their partners/employees from the USA, who are focused on diversifying their investments, better structuring their wealth management goals.

Story

The project goal was to build a multi-tenant solution and migrate the existing customers and organizations to the new software.



Customer Story

The key objective was to deliver a best-in-class omnichannel experience with cost-effective and compliant cloud infrastructure. Multi-asset trading, connectivity to core banking systems, powerful security, and compliance tools were among the key requirements for the software.

Solution

The Platform was delivered with a prebuilt back end, front end, and middleware technology customized and configured for a specific business case. The modularity and API ecosystem of the Velmie banking solution allowed reducing time-to-market to just a few months while building this type of product with an in-house dev team could take 2+ years. The microservices approach and other unique software architecture features provide the client with ongoing capabilities to extend the Platform offerings and markets by simply introducing new modules or partner APIs.

The Platform is entirely cloud-based and hosted on AWS servers, providing a highly scalable offering in the most flexible and secure cloud computing environment to date. As the AWS partner, we're able to set up single and multi-tenant infrastructure that complies with different regulatory policies, and in this particular case, there is a SOC 2 Type 2 cloud environment, security policies and certification were obtained.

Velmie allowed us to significantly reduce time-to-market when starting a wealth management solution. A huge advantage is the availability of customizations and the API middleware that allows fast connectivity to partner banks.

Tosin Osunsanya, Founder & CEO at TAPP Engine

Features

- Digital KYC/AML
- Branded debit cards
- Checking and Savings accounts
- Bill Payments
- ACH and Wire transfers
- Multi-asset trading
- Fractional shares
- Multiple user types
- iOS, Android and Web Applications
- and more...



SOC 2 Type 2 compliant

Velmie is ISO 27001 certified company and security is our key focus. We constantly improve our software and procedures to deliver best-in-class solutions. The security is carefully maintained on different levels including the infrastructure, software development practices and the company itself.

[See a demo](#)



About Velmie

Velmie exists to empower financial institutions with cutting-edge tech solutions providing great customer experiences, ultimate performance, and extreme scalability. Our modular cloud-native digital banking platform allow building very unique fintech solutions across the world. With the partner ecosystem and API orchestration layer our clients have quick access to payments services from the market-leading companies

Partner Ecosystem [Explore](#)

With our network of partners, we deliver end-to-end solutions for banking, payments, and crypto products.

jumio.

 **GlobalPass**

 **Solarisbank**

 **GALILEO | Pro**

ConnectPay

Rapyd

ondato

Thunes.

 **Currencycloud**

 **Enfuce**

 **Fireblocks**

 **BitGo**

ex**berry**

Security and Compliance

Velmie is ISO:27001 Certified company and we put a lot of attention to security and compliance of our software. It comes with all the key functions to set up regulatory-compliant operations on a company level while providing strong data protection to end users.



20+
million of users

70+
billion of assets

30+
partners

80+
tech team

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