



Cloud Migration & Software Dev for Financial Services Firm

PROJECT DETAILS

📁 Custom Software Development, Cloud Consulting & SI

📅 Dec. 2024 - Ongoing

💰 \$200,000 to \$999,999

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"They've helped reimagine how we can operate more effectively in a modern environment."

PROJECT SUMMARY

Hinology Technology Consulting LLC has migrated a financial services firm's IT infrastructure to the cloud using Microsoft Azure. They've also built a web-based software solution that aggregates client data.

PROJECT FEEDBACK

Hinology Technology Consulting LLC has helped the client improve their operational agility, collaboration, decision-making, customer engagement, uptime, and system reliability. The client's systems are also constantly monitored with alerts to detect issues in advance. Moreover, they're flexible.



The Client

Please describe your company and position.

I am the Managing Director of Client Advisor of a financial services firm.

Describe what your company does in a single sentence.

Freestone is an independent, fee-only wealth advisor to select high net worth individuals and families. We offer a full suite of services to help protect, grow and transfer your wealth and address all aspects of your financial life, giving you the freedom to focus on what truly matters.

The Challenge

What specific goals or objectives did you hire Hinology Technology Consulting LLC to accomplish?

- As a financial services firm, we deeply rooted in delivering high-quality, client-focused investment strategies. However, we faced challenges with our legacy infrastructure, which was limiting our ability to scale and innovate. Our internal systems were disjointed — some of our applications were still running on-premise, while others had migrated to the cloud in a fragmented manner. This not only slowed down operations but also created vulnerabilities and inefficiencies. We engaged Hinology Technology Consulting LLC with the goal of modernizing our IT infrastructure. Specifically, we wanted a partner who could help us fully transition to the cloud in a secure, compliant, and efficient way. Beyond infrastructure modernization, we also needed a tailored software solution that could unify our client-facing and internal platforms for better visibility, automation, and responsiveness. Our objectives were threefold: Migrate our legacy systems and applications to a secure, cloud-native environment. Build a custom software solution to centralize



client portfolio data and analytics. Ensure regulatory compliance and data integrity at every step of the transformation.



Jonathan Wittlin,
CFP
Managing Director of Client
Advisor, Financial Services Firm

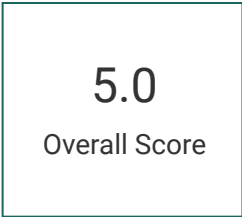


Financial services



Seattle, Washington

CLIENT RATING



Quality: 5.0



Schedule: 5.0



Cost: 5.0



Would Refer: 5.0





The Approach

How did you find Hinology Technology Consulting LLC?

- Online Search
- Clutch Site

Why did you select Hinology Technology Consulting LLC over others?

- Pricing fit our budget
- Great culture fit
- Good value for cost
- Company values aligned

How many teammates from Hinology Technology Consulting LLC were assigned to this project?

2-5 Employees

Describe the scope of work in detail. Please include a summary of key deliverables.

Hinology came in with a highly consultative and hands-on approach. The engagement began with a discovery and assessment phase, during which their team conducted thorough stakeholder interviews, technical audits, and compliance reviews. Their understanding of both the technology and the regulatory environment in financial services was immediately evident.

Scope of Work:

- Cloud Consulting & SI: Hinology designed and implemented a cloud migration roadmap using Microsoft Azure. They helped us decouple monolithic applications, replatform our core services into containerized microservices, and implement Infrastructure-as-Code (IaC) for scalable deployments.
- Custom Software Development: They developed a secure web-based platform that aggregates client data from various sources,





Hinology Technology Consulting LLC

provides real-time portfolio performance analytics, and integrates with our CRM and reporting tools.

- **Security and Compliance:** Hinology configured advanced security protocols, including role-based access controls, encryption at rest and in transit, and logging for auditability. Their team also guided us through internal SOC 2 compliance alignment during and post-migration.
- **Training and Support:** Post-deployment, Hinology offered extensive knowledge transfer sessions and provided a transition plan for ongoing maintenance and scaling.

Key Deliverables:

- Fully cloud-hosted environment with automated CI/CD pipelines.
- Custom analytics dashboard for portfolio insights.
- Integration layer to sync with third-party financial data providers.
- Detailed documentation and user training resources.

The Outcome

What were the measurable outcomes from the project that demonstrate progress or success?

The transformation significantly improved our operational agility. Our internal teams now have seamless access to real-time data across departments, which has drastically improved collaboration and decision-making. The new platform reduced the time it takes to prepare client reports and perform portfolio analysis, and client engagement has improved due to faster turnaround times on requests.

From a security standpoint, we experienced a major leap forward. Our systems are now consistently monitored, and we have proactive alerts that flag anomalies before they become issues. There was also a notable improvement in uptime and system reliability, which had been a pain point previously.





Hinology Technology Consulting LLC

Describe their project management. Did they deliver items on time? How did they respond to your needs?

Hinology's project management was structured yet flexible. They ran the project using Agile sprints, with weekly standups and biweekly reviews. Every deliverable was discussed in advance and delivered on schedule. Even when unexpected dependencies surfaced — such as a third-party data source being retired mid-project — they communicated proactively and adjusted the plan without affecting the overall timeline.

They were highly responsive. We never had to chase for updates or clarification. Whether it was a quick email response or an impromptu troubleshooting session, their team made us feel like a priority.

What was your primary form of communication with Hinology Technology Consulting LLC?

- Virtual Meeting
- Email or Messaging App

What did you find most impressive or unique about this company?

What truly stood out was Hinology's ability to align technical execution with our business goals. They haven't just 'lifted and shifted' us to the cloud; they've helped reimagine how we can operate more effectively in a modern environment. Their depth of knowledge in both cloud architecture and financial services gave us confidence throughout the process.

Another notable strength was their empathy — they genuinely listened to our concerns and adapted their language and approach depending on whether they were speaking with technical leads or business stakeholders. It felt like a true partnership, not just a vendor relationship.





Are there any areas for improvement or something Hinology Technology Consulting LLC could have done differently?

Nothing

