

# Wealth Management Platform Architecture

Channels

Mobile App

Web Portal

Advisor Workstation

API Partners

API Gateway / Integration Layer

Core

Client Onboarding

Portfolio Mgmt

Order Execution

Risk & Compliance

Reporting

Analytics

Goals Planning

Asset Allocation

Performance Attribution

Tax Optimization

ML Insights

Data Layer: Client Data | Holdings | Market Data | Reference Data

Custodians

Exchanges

Market Data

Regulators