

ID	Theme	Title	Objective	Milestones
3594	Expand & Scale Core Business	Build AUC Foundation (Milestone 1)	Build foundation components of AUC - Reference Data (Account Master and Security Master), Data Model, Environments, Design and Architecture.	Build UAT and Production AUC Environment
				Build Books & Records and other Backoffice Data Model in AUC
				Build data conversion/ migration process between ALF and AUC
				Build general maintenance functionality of Account and Security Master
				Build real-time or near real time integration to synch data between AUC and ALF.
3595	Expand & Scale Core Business	Build ALF BackOffice on AUC (Milestone 2)	Build and migrate BackOffice functionality for AUC.	Reverse Engineer all ALF subroutines for Back Office functionalities.
				Create implementation plan for AUC Milestone 2 (Back office).
				Build IBD Books and Records process (Balances, Transaction History, Stock Record)
3596	Streamlining Processes and Harnessing AI for Operational Excellence	Build AUC Agents & Workflow	As part of the Axos AI Strategy, AUC team will create agents and agentic workflow to aide us in our SDLC activities from requirements gathering (reverse engineering), development, QA and release.	Build Agent for Reverse Engineering ALF subroutines for BackOffice.
				Build Agent for creating QA Test Cases
				Build Agent/Process for ETL Testing
				Implement AI tools for release, code deployment.
				Build Agents for creating automated test scripts.
3597	Expand & Scale Core Business	Universal Core solutions for AXOS Banking and Clearing business	Collaborate with other Axos teams on how we can achieve a Universal Core Solutions for Axos.	Formulate a comprehensive Axos Core Evolution strategy to fully integrate the Axos Universal Core (including ALF, Beta, Jack Henry, and FIS).
				Evaluate and define the requirements for Closed Accounts as an initial project to foster synergy between the Banking and Clearing Cores.
3597	Expand & Scale Core Business	AUC Portfolio Management	Portfolio Management	Formulate a comprehensive Axos Core Evolution strategy to fully integrate the Axos Universal Core (including ALF, Beta, Jack Henry, and FIS).
				Evaluate and define the requirements for Closed Accounts as an initial project to foster synergy between the Banking and Clearing Cores.