## [Introduction]

Good afternoon everyone.  
I’m -- from the GFO Technology team here in Pune. It’s great to see so many familiar faces gathered for this Lunch & Learn.

As part of the Wealth Passport initiative — a platform at the heart of our wealth management services — our mission in GFO Tech is to make sure our technology is not just keeping pace with change, but driving it. Wealth Passport connects multiple capabilities that enable our Global Family Office clients to manage complex portfolios with speed, security, and accuracy. And behind that seamless experience, there’s a lot of coordinated effort from teams like ours.

Today, I’ll walk you through what we do in GFO Tech, our current priorities, and how our HUB / HIT structure brings it all together.

[Pause briefly, smile]

## [Our Responsibilities – What We Do]

Think of GFO Tech as the backbone of operational excellence for our domain. Our responsibilities cover:

* **Cost management & optimization** — ensuring every dollar spent on technology delivers maximum value. For example, streamlining infrastructure usage can free up budget for innovation.
* **Setting common technical goals** for domain teams — so whether it’s security, performance, or compliance, we’re all aiming for the same targets.
* **Evaluating intakes** — when a new project or change request comes in, we assess its impact and assign it to the right domain team. This is about making sure the right work reaches the right people, at the right time.
* **Improving OKRs** — OKRs, or Objectives and Key Results, help us measure success. We monitor them regularly and adjust plans to keep moving towards those goals.
* **Coordinating with external teams** — from vendor partners to other internal groups, making sure we work as one extended team.
* **Common development and testing** across GFO — creating shared assets and processes so we don’t reinvent the wheel.
* **Tracking common initiatives in ADO** — ADO, or Azure DevOps, gives us transparency and traceability from start to finish.

[Pause for emphasis]  
In short, our role is to keep the engine running smoothly while paving the road ahead.

## [Key Deliveries & Roadmap]

Let’s look at what’s on our plate right now:

* **OES to FGA migration** — moving from Oracle Entitlement Server to Fine-Grained Authorization. This isn’t just a technical upgrade; it’s a step towards more centralized, flexible, and secure access control. This impacts over 60 Wealth Passport services, so the scale is significant.
* **Pre-production environment setup** — giving teams a safe, stable environment to validate changes before they go live.
* **Bedrock initiatives** — foundational improvements that strengthen our long-term architecture.
* **Regression testing on request** — supporting both internal and external teams to ensure changes don’t break existing functionality.

Each of these is a building block towards a more resilient, scalable, and future-ready platform.

## [HUB / HIT Team Structure]

Now, how do we deliver all of this? Through a well-structured, collaborative model.

Our HUB / HIT team brings together:

* **GFO Leadership** — setting strategic direction.
* **Program & Delivery Managers** — ensuring projects stay on track.
* **Agile Coach** — helping us work smarter, not just harder.
* **Architects** — designing robust, scalable solutions.
* **Developers** — turning designs into working software.
* **Testers** — making sure what we build meets the highest quality standards.

We’re like different specialists in an orchestra — each with a unique role, but working in harmony to produce something greater than the sum of its parts.

And in the background, icons like the dollar sign for finance, the handshake for partnerships, the clipboard for compliance, and the building for institutional stability reflect the core values we protect and enable.

## [Conclusion – Why It Matters]

To wrap up — the work we do in GFO Tech isn’t just about delivering projects. It’s about enabling the Wealth Passport platform to serve our clients better, faster, and more securely.

Every initiative — from cost optimization to complex migrations — moves us towards a more connected, efficient, and innovative future. And it only works because of the collaboration, dedication, and expertise each of you brings to the table.

As we continue building, testing, and improving, let’s remember that we’re shaping not just technology, but the client experience that defines Northern Trust’s reputation in wealth management.

Thank you for your attention — and I’d be happy to take any questions.

[Pause, smile, invite discussion]