

# Financial retirement planning tool

## Legacy application rescue and refactoring

### About the client

Established in 2002, the client is a cloud based software-as-a-service (SaaS) company specializing in custom built and retail web-based financial solutions within the retirement plan industry.

Their mission is to build a best-in-class integrated technology platform of multiple plan metrics that supports advisors, plans sponsors and individual participants.

Fortune 500 clients include Principal Financial Group, Vanguard, T. Rowe Price, and TIAA

### Client need

The client needed to enhance and optimize a financial planner application with over 1B data points. The solution would require a reports tool to generate various types of reports, including analysis, benchmarking, and performance, for planners to guide their clients in a more accurate manner.

### Product challenges

The major challenge was refactoring a solution from the legacy .Net Framework, which was unable to keep up with the rapid growth and client demands. The overhaul required making enhancements to this legacy architecture and code without negatively impacting performance or security of the live site.

### The delaplex solution

delaplex created a SaaS solution that provided optimal performance and security while enhancing the user interface and experience. In addition, delaplex recommended and implemented fundamental database changes, including converting inline queries to stored procedures, data automation and aggregation, code minimization, and report generation time improvement.



“ We now produce faster...

“delaPlex’s understanding of multiple technology frameworks has allowed us to make product enhancements we never thought imaginable. We now produce faster and with more stable releases. Our clients trust what we deliver.”

CTO

Financial Planning Cloud Platform

## How we did it

The dedicated team at delaPlex utilized the following development concepts and tools to refactor our client’s aging financial planning program into a high performance SaaS app:

### Dynamic Application

Upgraded the legacy framework with Visual Studio .NET Framework and refactored the application greatly improving performance.

### Report generation

Implemented XSLT report templates which significantly decreased generation time.

### Application graphics

Leveraged 3rd party APIs to improve application and automatically process graphics.

### Monthly imports and validation

Enhanced SQL jobs to automate monthly data imports and validation processes.

## Core stack



Bootstrap



delaPlex is a global software development and business solutions provider helping companies drive growth, revenue and marketplace value. Our innovative business methodology has built an unmatched reputation of bringing an alliance of collaborative industry experts, across industries and skillsets, to clients anywhere around the world.



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