

# WHAT TO LOOK FOR WHEN BUILDING A SMARTER FINANCIAL INFRASTRUCTURE

by Anchor Bridge Innovations staff

In a sector where milliseconds matter, data must be clean, compliance must be airtight, and client experiences must be instantaneous. For financial firms, modernization is no longer a “future” goal — it’s a present necessity.

But how do you move fast without creating new risk? How do you unlock automation without breaking your compliance framework? And how do you integrate new tools without adding technical debt?

Here are some key considerations for selecting a technology partner that understands finance — and delivers real return on infrastructure investment.

## Top Evaluation Criteria: What Financial Firms Need in a Modernization Partner

### 1. Data Integrity and Auditability

Finance is built on trust — and trust depends on clean, validated data. Look for vendors that prioritize:

- Real-time data synchronization across platforms
- Automated reconciliation and data lineage tracking
- Transparent audit trails for every process step
- Alignment with SEC, FINRA, MiFID II, and internal controls

As Gartner Inc. noted in their *Financial Compliance Performance Study 2024*, “In 2024, over **45% of firms failed** at least one internal audit due to fragmented data processes.”

### 2. Interoperability and Integration Readiness

Your systems weren’t built overnight — and you don’t need to replace everything at once. Partners should be able to:

- Integrate with legacy systems (OMS, PMS, CRM, risk platforms)
- Offer API-driven flexibility and vendor-agnostic architectures
- Support hybrid cloud/on-prem environments

This approach avoids business disruption while creating a platform for long-term evolution.

### 3. Operational Automation That Scales

Efficiency is ROI. Seek solutions that automate:

- Performance calculations
- Risk exposure monitoring
- Client reporting and personalization
- Regulatory reporting (Form PF, AIFMD, ADV updates)

According to *CIO Dive*, firms implementing automation in key middle-office functions saw an average **24% reduction** in operational costs in Year 1.

## 4. Security That's Proactive, Not Reactive

Cyber risk is financial risk. Your technology partner should be fluent in:

- End-to-end encryption and tokenization
- Zero Trust architectures
- Role-based access controls
- Continuous threat monitoring
- SOC 2, ISO 27001, and other audit-ready frameworks

Modernization without security is a liability — not an upgrade.

### ABI's Approach: Results-Driven Modernization for Finance

Anchor Bridge Innovations serves asset managers, advisory firms, and mid-sized financial institutions that need secure, scalable modernization — with outcomes that speak in the language of finance: efficiency, clarity, and compliance.

Our Financial Transformation Framework:

1. **Discovery plus Diagnostic Audit**  
We identify pain points in data integrity, performance reporting, and system interoperability.
2. **Strategic Roadmapping**  
We design infrastructure upgrades to deliver tangible ROI and measurable risk reduction.
3. **Phased Implementation**  
We deploy with no downtime, full test validation, and full audit traceability.
4. **Post-Launch Optimization**  
Our support includes monitoring, refinement, and quarterly performance/efficiency reviews.

We speak your language — cost-per-trade, time-to-report, risk-adjusted returns — and we build systems that support those metrics in real time.

### What to Do Before You Choose a Vendor

When evaluating partners, ask:

- Can they validate how their systems improve compliance readiness?
- Do they offer phased deployment to reduce operational risk?
- Can they integrate with — not just replace — existing investments?
- Do they speak *both* technology and finance fluently?

Want a checklist to assess financial tech partners with confidence? See our scorecard, "*The Financial Infrastructure Partner Scorecard: 10 Questions for Risk-Smart CIOs.*"

Or if you prefer, connect with an ABI specialist to review your current architecture and identify high-ROI upgrade opportunities — no pressure, just clarity.

## About Anchor Bridge Innovations

Anchor Bridge Innovations is a high-tech Value-Added Reseller founded by seasoned IT professionals. We deliver secure, scalable, and future-ready technology solutions tailored to the needs of small and mid-sized enterprises. By partnering with top-tier OEMs and next-gen innovators, we offer a full spectrum of services — including data infrastructure, cloud, cybersecurity, automation, and networking — all backed by white-glove support from planning through post-deployment.

At ABI, we don't just sell technology — we deliver clean, real-time data across your systems for decisions that can't wait.