



FinTech

/Customer Story

Our FinTech client specializes in Robo Advisor platforms helping investment firms and their advisor community better serve investors.

["In the age of digitization, corporations have to argue their service offerings by enabling their workforce and partners to serve the customers efficiently and with speed. The financial industry has seen a lot of change in this regard as banks; investment and insurance houses digitize their products, processes and services. In fact we have seen that to do this, most of them have to integrate with 3rd party technology companies (Fintechs) to provide expertise that perhaps is lacking with the business. At the heart of this exciting change are digital identities."]

-Mooketsi Regoeng
Digital Platform Architect – I'Curity

/Challenge

The Robo Advisor platform integrates with 3rd party platforms for identity verification, seeding, authentication and authorization in a number of ways. Being able to integrate seamlessly and with scalability enables our client to better realize the core functions of the Robo Advisor platform. The client required an identity and API platform that is:

- Scalable and robust
- Highly available
- High level degree of data and environment exclusive control
- Adheres to open standards
- Considered legal and business liabilities
- Ability to serve multitudes of investors and advisors at scale
- Ability to scale at low cost
- Meets different partner needs
- Secure identity data
- fosters innovations and rapid change
- Provide privacy, consent
- Supports DevOps for agility and speed

/Architecture Design

I'curity Solutions developed an architecture roadmap and a phased implementation plan of the Private Cloud IAM and API platform.

Together with our partners we performed the following:

/Workshops

- Ran Identity Strategy workshops
- Deep dive technical identity protocols and standards workshops
 - OAuth 2.0
 - OIDC 2.0
 - SAML

/Architecture Artifacts

- Developed IAM Capability Maturity Roadmap
- Developed High Level Architecture
 - Sets up the scope of the IAM capability
 - Details high level business requirements (incl. stakeholder analysis)
 - Detail architecture principles to govern the design and the delivery of the platform

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- Details the baseline, transitional and target architectures
 - Sets out Test environment approach
 - Developed Detailed Technical Design
 - Infrastructure Design
 - Sizing
 - Logical Topology
 - Functional Design
 - Non Functional Design (with specific focus on Privacy aware architecture principles [Persistent Anonymous Identifiers across the ecosystem])
 - Data Ownership, Stewardship, Custodianship and Flows
 - Availability and Resiliency
 - Security Design /Platform controls
 - Data Migration and Cutover
 - Concepts of Operations (CONOPs)

/Detailed Technical Use Case Design

As part of our deliverables, I'curity created detailed technical use cases to support different user scenarios/stories. These technical use cases were based on SAML 2.0, OAuth 2.0 and OIDC 2.0 flows in order to align with best practice while enabling the client to achieve the necessary user experience across all channels of interactions (mobile and web).

/The Platform

To meet the client's requirements around agility, scalability, privacy, consent and innovation, The Gluu server was chosen for IAM. Kong API gateway was also a preferred solution for API requirements.

