

3-Day Technology & AI Review for Boutique Financial Firms

Independent assessment of where to automate, what to buy, what to build, and where AI is genuinely useful.

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Led engineering modernisation across London/Paris/NY

WHO IT'S FOR

Boutique brokers, asset/wealth managers, specialist lenders, hedge funds and financial firms running a mix of vendor platforms, Bloomberg/Excel, Python scripts and manual operational workflows.

Management sees opportunities to modernise technology and use AI, but the right priorities, architecture and level of investment are unclear.

WHAT I REVIEW IN 3 DAYS

- Current systems, workflows and manual bottlenecks
- Build vs buy decisions - including what you should not build yourself
- Data architecture across vendor systems, Bloomberg, Excel and Python
- Automation opportunities and practical quick wins
- Where AI creates real value vs unnecessary complexity
- Resourcing model: internal engineering vs vendors or specialist support
- Proportionate security, governance and operational controls

WHAT YOU GET

- Concise management report: what to automate, buy, build or leave alone
- Prioritised 90-day technology roadmap
- Recommended first three investments
- Build-vs-buy recommendations with vendor options where relevant
- 20-minute walkthrough + 30-minute implementation discussion with management

FIXED FEE: EUR 2,200

Delivered remotely in 3 business days. NDA welcome.

If it isn't a fit after a 10-minute scoping discussion, I'll tell you before you spend anything.

Next step: send me a short note on your current setup and priorities - I will tell you if it is a fit.