

AUM Acquisition & Dispositions Reports Automation

Financial Reporting Solution

The AUM Acquisition & Dispositions application, powered by the Aurachain low-code platform, offers a streamlined solution for financial institutions aiming to automate and orchestrate their asset reporting approvals. This application addresses core inefficiencies in the review and sign-off process for acquisition and disposition reports, significantly improving data accuracy, reducing manual effort, and accelerating compliance cycles.

Problem overview

Financial institutions face multiple challenges in managing asset reporting workflows. Coordinating approvals across a wide range of stakeholders under tight deadlines—often within a one-week window—introduces risk and inefficiencies. Key pain points include:

Manual Coordination & Delays

The current process relies heavily on email notifications with Excel attachments and ad-hoc follow-ups. This results in delayed approvals, overlooked discrepancies, and poor visibility over pending actions.

Lack of Structured Workflow

Without a centralized approval process, reports are frequently reviewed late or inaccurately. Controllers and delegates must manually sift through data, increasing workload and the risk of compliance breaches.

Repetitive Error Handling

Recurring exceptions and database discrepancies consume valuable time. Manual validation is prone to error, while redundant effort slows down the reporting cycle.

Key Features

The AUM Acquisition & Dispositions solution leverages automation and structured workflows to streamline the approval process, minimize errors, and ensure timely reporting. Key capabilities include:

1. Automated Notifications

The system monitors key dates and automatically sends email alerts with relevant report attachments to delegates and controllers, ensuring stakeholders are engaged at the right time.

2. End-to-End Approval Tracking

Tracks every stage of the approval process with role-based task assignment, status monitoring, and automatic escalations for delayed approvals.

3. Structured Four-Step Iteration Workflow

Operates in four validation cycles each month to review, reassign, escalate, and finalize reports – all running only on valid business days.

4. Real-Time Exception Detection

Automatically retrieves and flags pricing discrepancies and data exceptions from the customer database, assigning them to controllers for early resolution.

5. Dynamic Task Updates

When pricing or exceptions change, the system either updates the existing task or generates a new one, ensuring stakeholders always act on current data.

6. Final Validation & Delegate Sign-Off

Performs a last round of checks before final approval. Pending tasks are escalated, and delegates receive a summarized report to complete sign-offs on time.

7. Seamless Data Integration

Directly extracts acquisition and disposition reports from customer systems using automated scripts, eliminating manual data entry and improving report accuracy.

Highlighted Benefits:

Turn compliance-heavy reporting into a fully automated and governed approval process.

- **Accelerate Sign-Offs.**
Reduce the reporting approval process from multiple days of follow-ups to a structured and trackable workflow.
- **Improve Data Accuracy.**
Flag inconsistencies early and ensure controllers are always working with the most up-to-date data.
- **Minimize Manual Effort.**
Automation reduces repetitive tasks and manual coordination, freeing up teams for higher-value work.
- **Ensure Timely Compliance.**
With built-in validations and escalation mechanisms, approvals stay on track—even under tight deadlines.

Why Aurachain Solutions

Designed to represent the newest generation of low code technologies, Aurachain is the right platform for accelerating and managing the automation of digital banking solutions. In that regard, our clients choose Aurachain to achieve the following:

Speed of application rollouts

With Aurachain, automation projects that once took 6 months to a year are now completed in weeks, or even days. This accelerates business agility, providing a distinct competitive advantage in winning customers' favor.

Changeability

Aurachain enables swift application changes within hours or minutes, eliminating lengthy change request queues. This ensures seamless alignment with the operational parameters of the organization, maintaining optimal functionality.

Built in functionalities

For managing high value operational processes within financial services, Aurachain offers out-of-the-box functionalities, such as real-time process monitoring to identify bottlenecks, on-the-fly case remediation, case-specific document repositories, and comprehensive end-to-end business and technical audits.

Governance

Aurachain ensures maximum IT and organizational governance in deploying and managing applications. Standard features include three environments with governed promotions and a highly granular permissions system, providing control at any level of system or application.

Scalability

Aurachain's architecture, designed with microservices, cloud design, and built-in containerization, seamlessly supports scalable usage loads. It allows effortless scaling from dozens to thousands of users and hundreds to hundreds of thousands of cases with a simple push of a button.

Speak to an expert

Connect with our experts now to explore how Aurachain's cutting-edge low-code technology can accelerate and optimize your automation journey!

» [BOOK A CONSULTATION](#)

