

Challenges of Today and Tomorrow: How Symphony Drives Security and Collaboration in Wealth Management



Symphony

Symphony is a communication and markets technology company powered by interconnected platforms: messaging, voice, directory and analytics. Our modular technology – built for global finance – enables over 1,400 institutions to ensure data security, navigate complex regulatory compliance and optimise business interactions.

What has been the most impactful innovation your firm introduced recently, and how has it shaped client outcomes or internal efficiency?

Symphony addresses pressing challenges in wealth management. Recently, the firm launched AI Agent Studio, enabling institutions to quickly create and deploy AI agents across internal and external workflows. Leveraging best-in-class compliance infrastructure, firms can automate tasks while retaining data ownership and control. The studio integrates with Symphony's Confidential Cloud platform, launched in 2025, combining cloud scalability with security previously achievable only on-premise. Symphony's Microsoft Teams interoperability lets users connect with external counterparties, reach customers on WhatsApp and other channels, and link internal Teams and Symphony Messaging users, expanding bot workflows beyond Symphony Messaging for greater impact.

How do you cultivate a culture that consistently drives excellence and high performance?

Symphony has been serving global financial markets for 12 years, where innovation in technology and excellence in service are paramount. We believe that Symphony is a place for innovators. We are a collaborative workforce reinforced by strong leadership and a desire to succeed. The diversity of our employees brings creativity and bright ideas to complex problems. Our employees work together effectively and seamlessly, even when faced with challenges, and lean in to solve problems and delight customers internally or externally. We adapt quickly to customer needs with confidence and resiliency. We are where markets connect and collaborate, #WeAreSymphony.

What role has collaboration - either internally or with external partners - played in your success?

A key aspect of Symphony's offerings is workflow collaboration, both internally across front, middle and back offices and externally with other firms through secure channels. Symphony has always worked tirelessly, in collaboration with its investors and long-term customers, to promote and build a community that thrives on connectivity and collaboration. This focus, coupled with strong partnerships that provide critical market solutions, such as TradingView and Taskize, has allowed Symphony to grow into a technology provider synonymous with collaboration.

What are the key challenges you foresee in wealth management over the next five years, and how are you positioning your business to meet them?

Modern technology and workflows are advancing rapidly, creating a complex environment of data fragmentation and permanent cybersecurity challenges. This presents unique challenges for firms, particularly in navigating the increasingly complex regulatory landscape and in implementing agentic AI. Coupled with the essential need to share this data through secure, regulated channels, wealth management faces a distinctive set of challenges. Symphony's strategy focuses on anticipating market needs by developing solutions for new and growing challenges in secure communications and workflow collaboration.

What does winning this award mean to your firm, and how will you use this recognition going forward?

Winning this award is a tremendous honor for Symphony, validating our initial recognition within the wealth management industry. It validates that our products are highly effective in addressing the client communication needs amid an evolving regulatory and technological landscape. Leveraging this award will demonstrate to wealth management leaders that Symphony is a vital solution for firms seeking to communicate with their clients on their preferred channels, without compromising security or compliance.



Private, secure client conversations

Relationship-first communications at the heart of wealth management



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