

10-year partnership: How Ord Minnett built a technology foundation for generational wealth management

When one of Australia's most trusted financial advisory firms needed to transition their entire technology stack with zero downtime, they found more than a service provider – they discovered a true business partner for the next decade.



Building wealth requires building trust

For over 150 years, Ord Minnett has helped Australians build and protect wealth across generations. With \$71.1 billion* in funds under advice and 270 financial advisers across 16 locations, the firm's reputation is built on trust, expertise and unwavering reliability.

In 2020, when the opportunity arose for a management buyout, Ord Minnett faced a unique challenge: transitioning its entire technology infrastructure while maintaining seamless client service.

"In wealth management, technology isn't just about efficiency – it's about trust," explains Philip Chu, Chief Operating Officer at Ord Minnett.

"Our advisers need instant access to markets, client data and communications. Any downtime doesn't just cost money, it potentially undermines the client trust we've nurtured over generations."

The scope of the transformation was comprehensive: new network infrastructure, hosted platforms, unified communications, cybersecurity frameworks and complete hardware refresh across all locations. Most critically, it all had to happen without a single moment of downtime.

Zero-downtime transition during 8-month transformation

After evaluating multiple providers, Ord Minnett chose Nexon Asia Pacific (Nexon) for their partnership approach as much as for their technical capabilities. As one of Nexon's first major financial services clients, Ord Minnett represented an opportunity for both organisations to grow together.

"What stood out about Nexon was their commitment to understanding our business. They didn't just want to provide technology services – they wanted to become true business partners who understood what drives success in wealth management," says Philip.

The initial implementation required intense collaboration. Over a dozen team members from each organisation worked together for eight months, including during the COVID-19 pandemic, to ensure a flawless transition.

Nevien Badawi, Chief Sales Officer at Nexon, recalls the complexity: "Ord Minnett's requirements were unique – they needed enterprise-grade reliability with the flexibility to support a wealth management business. We designed every element of their infrastructure with their clients' success in mind, including hosting critical elements of their trading platforms."

The transition itself demonstrated the partnership's strength. Working over a carefully planned weekend, Nexon successfully moved Ord Minnett's entire technology stack to their new environment with zero downtime – a critical achievement for a business where market access equals revenue.

99.99% uptime keeps wealth advisers connected to markets

Five years later, the foundation Ord Minnett built with Nexon delivers consistent results. With 99.99% infrastructure uptime, advisers maintain reliable access to the systems they depend on for client service and market transactions, including direct interconnections to trading platform partners.

ORD MINNETT

At a glance

Industry

Financial Services, Wealth Management

Challenges

- Full technology stack transition with zero tolerance for downtime
- Mission-critical 24/7 trading and client management systems
- Highly regulated cybersecurity compliance
- Ongoing acquisitions and office expansions

Solutions

- Fully managed IT infrastructure and support
- Hosted infrastructure with 24/7 monitoring
- Cybersecurity with SOC and virtual CISO
- Unified comms/collaboration platforms

"Nexon's reliability has been outstanding. We have dedicated on-site support teams at our key locations, monthly service reviews to address issues before they impact business and 24/7 monitoring that ensures problems are resolved quickly," notes Philip.

The partnership has evolved to support Ord Minnett through significant business changes, including acquisitions, office expansions and technology modernisation.



When the firm acquired another financial services business, Nexon seamlessly integrated the new infrastructure and staff into Ord Minnett's environment.

"They're involved right from the planning stages," explains Philip. "Whether we're expanding offices, consolidating systems or implementing new technologies, Nexon understands our business well enough to provide strategic guidance, not just technical execution."

This business understanding was demonstrated when Ord Minnett needed to refresh their desktops and laptops. Rather than pushing a one-size-fits-all solution, Nexon worked collaboratively to find the most cost-effective hardware supplier, even when it meant stepping back from parts of the project to maximise client value.

End-to-end infrastructure for 600 users spanning 15 sites

Beyond tactical technology solutions, Nexon delivers strategic consulting and end-to-end infrastructure management, giving Ord Minnett confidence across its entire technology stack. This comprehensive approach spans:

Cloud & Infrastructure Services:

- Nexon Cloud hosting – redundant data centres
- Disaster Recovery as a Service (DRaaS)
- Service desk support for 600 users – Citrix, Oracle and SQL database management
- Complete device lifecycle management

Security & Compliance:

- 24/7 Security Operations Centre (SOC) with SIEM threat intelligence
- Cybersecurity solutions covering perimeter, endpoint and user activity monitoring

Network & Connectivity:

- Fully managed SD-WAN connecting 15 sites including Hong Kong
- LAN and Wi-Fi management across locations
- Hardware procurement and deployment

Unified Communications:

- Hosted Microsoft Teams telephony
- Secure, scalable Active Directory and Office 365 tenancy management

The result is optimised IT operations with scalable infrastructure that supports growth and acquisitions. Real-time monitoring and automated systems reduce risks while strengthening compliance with financial services regulations. This delivers predictable IT spending and future-proofed technology investments.

Building and innovating for the next generation

The recent five-year contract renewal reflects both satisfaction with past performance and confidence in future innovation. The extended partnership positions Ord Minnett to embrace emerging technologies while maintaining the reliability their business demands.

Built into the new agreement is flexibility, including a planned cloud strategy assessment to help Ord Minnett adopt new technologies while controlling subscription and fixed costs. The partnership also includes virtual Chief Information Security Officer (CISO) services to help Ord Minnett's security framework evolve with new threats and regulations.

Initiatives include migrating from Skype for Business to Microsoft Teams, enabling more flexible collaboration, and exploring the potential of AI through Microsoft Copilot.

"We're in the early stages of our AI journey, but having Nexon as our technology partner gives us confidence to explore these opportunities thoughtfully," explains Philip. "They understand that in our industry, we need to be progressive yet cautious."

98.42% client satisfaction validates decade-long partnership

Nevien reflects on the partnership's evolution: "Working with Ord Minnett



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Philip Chu
Chief Operating Officer at Ord Minnett

has been incredibly rewarding. They've trusted us with their most critical technology infrastructure, and we've delivered the reliability and innovation they need to serve their clients across generations. This five-year renewal represents a true vote of confidence in our partnership."

With a 98.42% client satisfaction score and infrastructure that delivers 99.94% uptime, the partnership demonstrates how the right technology foundation enables financial services firms to focus on securing the future of Australian families and businesses.

"Nexon doesn't just provide technology services – they're true business partners who understand what drives our success in wealth management. As we look ahead to the next five years, we know we have a partner committed to helping us continue building wealth for our clients for generations to come," concludes Philip.

About Nexon

Nexon is an award-winning digital consulting and managed services partner for mid-market, enterprise and government organisations across Australia. We offer clients a uniquely broad suite of solutions requiring end-to-end capabilities coupled with specialist expertise in security, cloud and digital solutions. As a certified and accredited local and state government provider, CREST and ISO-certified, Nexon partners with world-class technology vendors to deliver innovative and integrated solutions.

To find out about Nexon, call us at **1300 800 000**, email us at **enquiries@corp.nexon.com.au**, or visit **nexon.com.au**

