



## CDW Financial Services

# Technology That Moves Finance Forward

### CDW Financial Institutions Technology Services

Financial institutions today must balance innovation with security, compliance and operational efficiency. CDW understands that capital markets, depository institutions and insurance companies each have unique challenges and requirements.

Whether modernizing legacy infrastructure, navigating complex regulations or enhancing digital experiences, our financial services solutions are designed to address the specific needs of each sector — helping institutions streamline operations, strengthen security and drive growth with tailored, cutting-edge technology.

CDW Financial Institutions Technology Services provide the expertise and technology to help your organization strengthen cybersecurity, optimize cloud adoption, leverage AI for data-driven insights and ensure seamless IT integration during mergers and acquisitions. With deep expertise in fintech ecosystems, we enable seamless API connectivity, end-to-end security and full-stack development to support evolving digital finance needs. Our strong partnerships and flexible approach help financial institutions stay agile, secure and ready for the future.





## Expertise

### Strategic technology expertise for financial institutions

#### Amazing happens when the right team is in your corner.

Whether you need to modernize core infrastructure, enhance security or optimize operations, CDW Financial Institutions Technology Services provides expert guidance tailored to your institution.

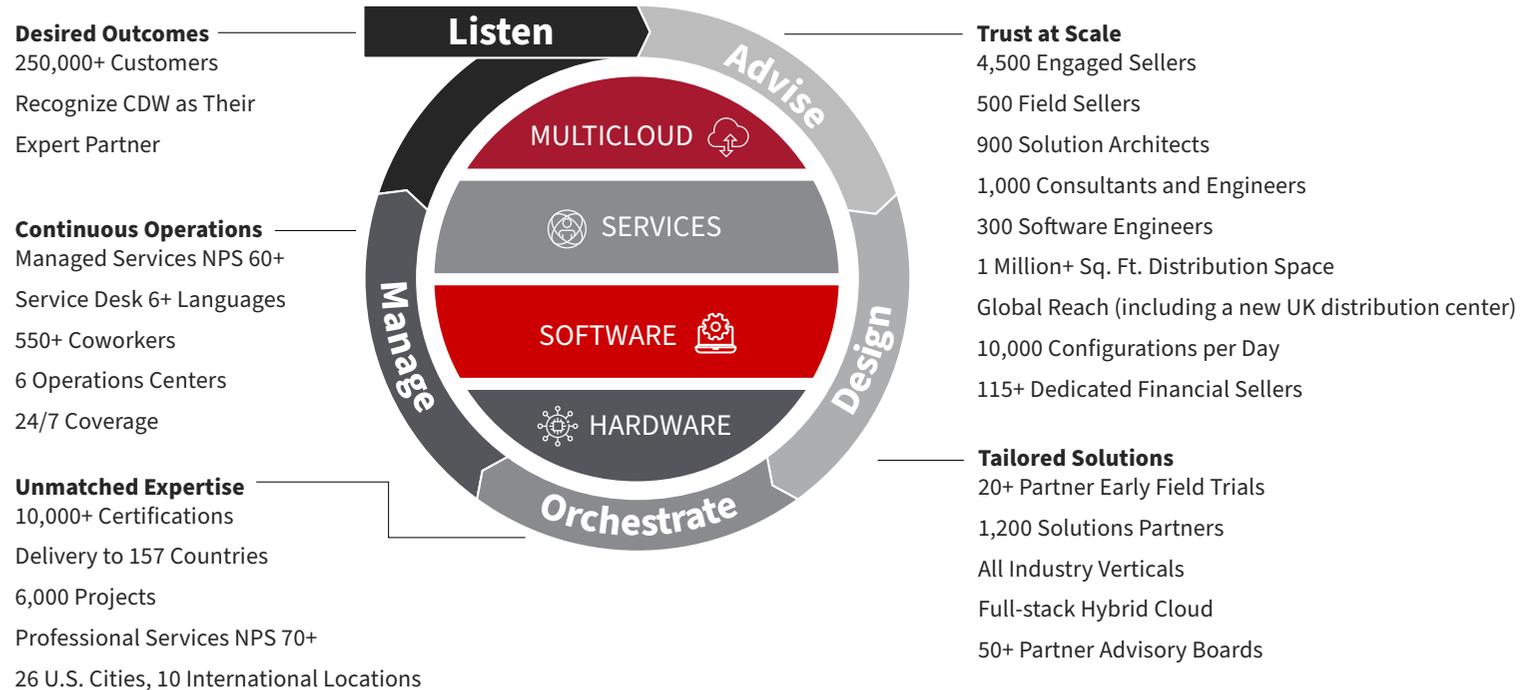
Our specialists bring deep industry knowledge, technology expertise and strong partner relationships to help you navigate digital transformation, mitigate risk and drive efficiency. We empower you to stay ahead of market demands with innovative, scalable solutions designed for long-term success.

#### Our approach

We understand that financial institutions require technology solutions that are secure, scalable and future-ready. As your organization grows, your IT infrastructure should evolve seamlessly to support new capabilities without disruption.

With a full suite of advisory services, solution design, implementation and managed services, CDW helps financial institutions build and sustain technology environments that enhance performance, improve customer experiences and meet regulatory requirements — all without slowing down innovation.

### Full stack. Full lifecycle. Full outcomes.



## Services

### A strategic partner for long-term success

Technology alone isn't enough — you need a partner who understands your goals and helps you stay ahead of evolving expectations. Your dedicated CDW account team works closely with you to develop future-ready strategies that maximize your technology investment, enhance performance and deliver lasting value.

CDW offers a full lifecycle of services, including:



#### Design

Leverage our expertise, advanced tools and data-driven approach. We provide strategic recommendations that empower you to seize new digital opportunities with confidence.



#### Orchestrate

Our specialists configure and deploy tailored solutions, ensuring your technology is implemented seamlessly and performs optimally from day one.



#### Manage

Round-the-clock support and proactive technology management help extend your IT team's capabilities, saving time and resources while keeping your operations running smoothly.



#### Infrastructure

Build a scalable, future-ready foundation with expert guidance and cutting-edge tools. With 300+ certified engineers, we help you modernize data center architecture whether you're on-premises, migrating to the cloud or already operating in a hybrid environment.



#### Workspace

Create a seamless, collaborative digital workspace. Our planning and design workshops help you implement unified communications platforms that enhance productivity, streamline workflows and ensure secure, always-on connectivity — all with remote support and automation capabilities.



#### Security

Strengthen your defenses with expert risk assessments and security strategies. CDW consultants identify vulnerabilities, enhance threat visibility and help you stay ahead of evolving cyber risks with a portfolio of tailored security solutions.



#### Support

Augment your IT team with customized support solutions. From service desk assistance to proactive monitoring and maintenance, CDW can help you reduce downtime and improve operational efficiency so your team can focus on strategic initiatives.



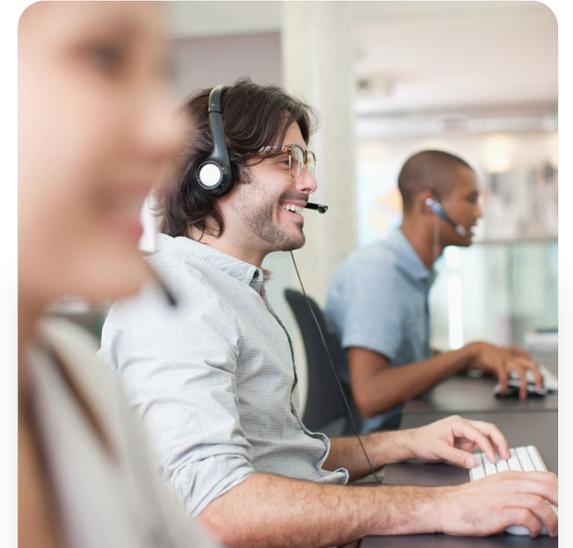
#### Data

Turn data into a competitive advantage with AI- and ML-powered analytics. Our experts help you design, build and deploy modern data solutions that transform raw data into actionable insights, enhancing decision-making and business growth.



#### Development

Accelerate innovation with modernized applications and custom development. Streamline delivery through DevOps, build custom applications and optimize existing software, ensuring your technology keeps pace with business demands.



### CDW ServiceNow® Solutions

IT service management and digital workflow platforms are rapidly becoming a cornerstone of IT. As a ServiceNow® Elite Partner and the 2021 Elite Segment Partner of the Year — with a leading CSAT score of 4.42 or above (out of 5) — CDW helps you optimize the value of your ServiceNow investment and streamline IT operations across your organization.



Financial Services

Expertise

Services

**Capital Markets**

Trading Firms

Depository Institutions

Insurance Firms

Make amazing happen.

Efficiency in Operations

New Market Opportunities

## Capital Markets

### Building a robust and secure infrastructure for capital markets

In capital markets, speed, security and resilience are essential. Firms must process massive datasets, execute trades in milliseconds and ensure regulatory compliance — all while mitigating risk and safeguarding sensitive information. A strong technology foundation is critical to maintaining a competitive edge.

#### Cloud computing and high-performance computing

Hybrid and multicloud environments provide the flexibility to optimize performance while managing costs. For real-time risk modeling and complex financial calculations, high-performance computing (HPC) delivers the power needed to support advanced pricing and trading strategies.

#### Data management and cybersecurity

Data lakes and warehouses centralize structured and unstructured data, enabling faster insights and improved decision-making. Zero-trust architecture, threat intelligence and disaster recovery solutions help firms protect sensitive financial data and maintain operational continuity.

#### Regulatory compliance and data privacy

Regulatory technology solutions and real-time stress testing help firms stay ahead of evolving regulations such as Basel III, MiFID II and Dodd-Frank. Our data privacy expertise ensures compliance with GDPR, CCPA and other regional laws, safeguarding customer and transaction data.

#### API architecture and ecosystem integration

A modern API framework enables seamless integration across trading platforms, analytics tools and partner ecosystems. This enhances operational agility and ensures firms can adapt quickly to market changes.

With CDW as your partner, you can build a resilient, high-performance infrastructure that drives innovation while keeping your firm secure and compliant.



## Efficiency in Operations

### Driving efficiency and operational excellence in capital markets

As markets become more complex and client expectations evolve, firms must embrace digital transformation to enhance efficiency, improve client engagement and optimize operations.

**By leveraging automation, real-time data and advanced analytics, capital markets firms can streamline processes while maintaining compliance and mitigating risk.**

### Automation and process optimization

Robotic process automation (RPA) and AI-driven automation reduce manual workloads across the trade lifecycle, improving speed and accuracy. Straight through processing (STP) further enhances efficiency by automating trade capture, clearing and settlement, minimizing delays and errors.

### Blockchain and real-time data integration

Blockchain and distributed ledger technology (DLT) enable faster, more secure post-trade processes through smart contracts and decentralized verification. Real-time data integration consolidates trading, operational and market data, providing firms with actionable insights for better decision-making.

### Risk, compliance and analytics

Automated risk and compliance analytics help firms monitor regulatory requirements, detect anomalies and generate real-time reports to meet evolving standards. AI-powered surveillance enhances fraud detection and ensures transparency in trading activities.

### Client-centric digital platforms

Today's investors expect seamless, intuitive digital experiences. Modern mobile trading platforms, unified client portals and AI-driven advisers enhance engagement, providing personalized insights and frictionless interactions across multiple channels.



## New Market Opportunities

### Unlocking new market opportunities through innovation

Capital markets firms can embrace emerging technologies to stay ahead of rapid market shifts and evolving investor demands. By leveraging AI, machine learning and next-generation computing, firms can inspire intelligent decision-making, uncover new revenue streams and drive future growth.



#### AI and advanced analytics for smarter trading

Predictive and prescriptive analytics powered by AI enable firms to optimize trading strategies, manage portfolios more effectively and anticipate market trends. Machine learning and natural language processing (NLP) further enhance decision-making by analyzing market sentiment and detecting fraud in real time.



#### Digital assets and tokenization

The rise of tokenized assets is transforming capital markets, creating changes to digital asset management and fractional ownership of securities, real estate and commodities. This innovation increases liquidity, expands investment opportunities and enhances market accessibility.



#### Next-generation computing power

Breakthrough technologies like quantum computing are revolutionizing risk modeling and complex pricing calculations, while edge computing accelerates real-time trading execution by processing data closer to the source, reducing latency.



#### Sustainable investment and ESG analytics

As demand for responsible investing grows, firms must integrate AI-driven environmental, social and governance (ESG) analytics to assess sustainability risks, track carbon footprints and provide investors with transparent ESG insights.



## Trading Firms

### Building a scalable and resilient trading backbone

In today's fast-paced trading environment, firms must operate using infrastructure that is fast, scalable and secure. With increasing market volatility, evolving regulations and the need for split-second decision-making, a strong technology foundation is essential to staying competitive.

#### High-performance computing and low-latency networking

Ultra-fast execution is critical for modern trading strategies. High-performance computing (HPC) powered by GPUs, FPGAs and distributed computing clusters enables firms to run complex algorithms and execute trades at lightning speed. Low-latency networking solutions such as edge computing and proximity trading reduce execution delays, ensuring firms can capitalize on market opportunities in real time.

#### Cloud scalability and security

A hybrid cloud model provides on-demand computing power, allowing firms to scale up during peak trading periods while maintaining cost efficiency. At the same time, zero-trust architecture, end-to-end encryption and data loss prevention (DLP) solutions ensure trading environments remain secure and compliant with industry regulations.

#### Risk management and compliance automation

Real-time risk management systems leverage advanced analytics and scenario simulations to help firms mitigate potential losses and navigate market fluctuations. Additionally, regulatory technology automation streamlines compliance by automating reporting and ensuring firms meet evolving regulatory requirements.

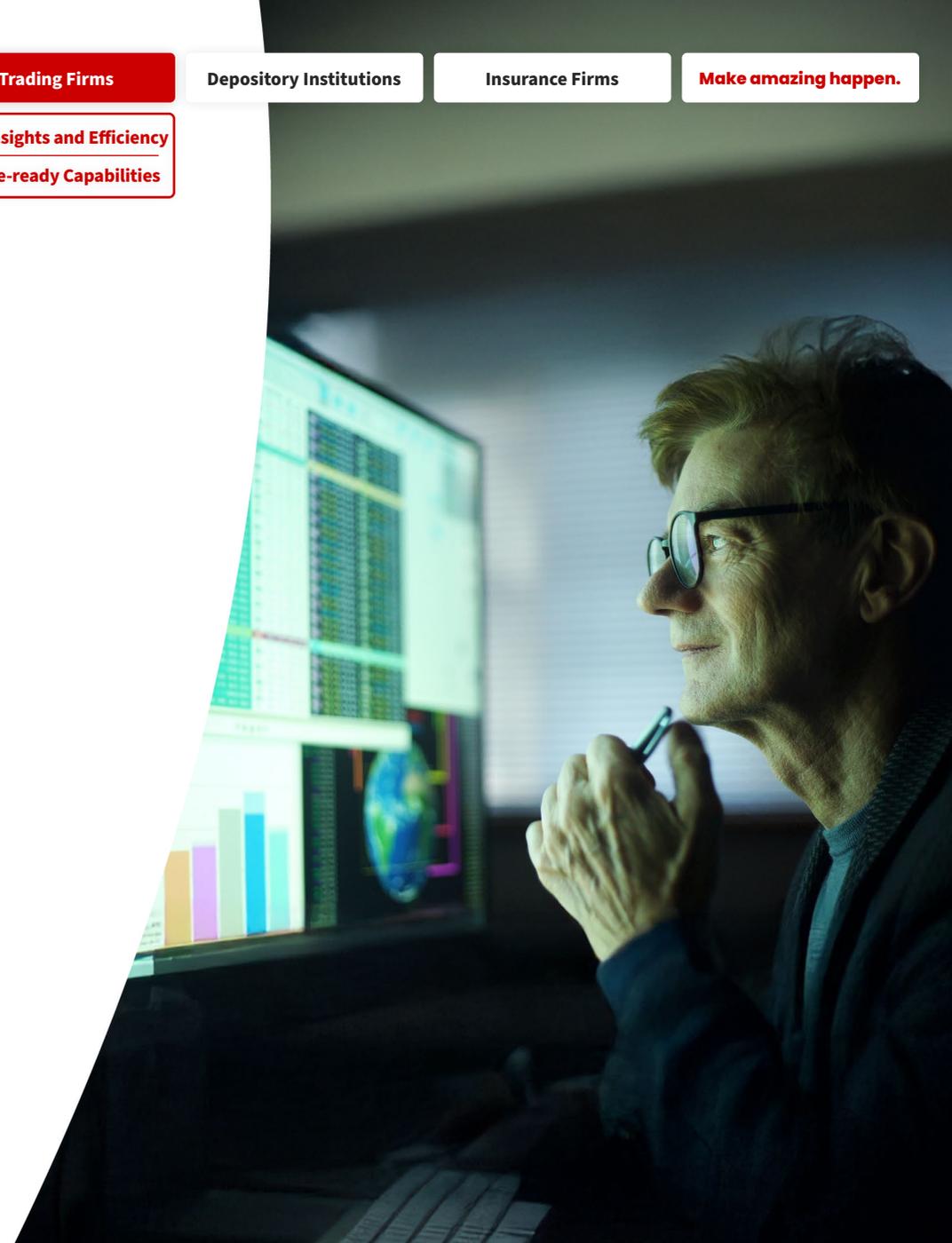
#### The shift to GPU-powered HPC

Traditional risk modeling and derivatives pricing, such as Monte Carlo simulations and Black-Scholes modeling, have historically relied on CPU-based computing. However, with the demand for faster, more complex calculations, firms are increasingly shifting to GPU-accelerated HPC. This transition enables higher-speed simulations, deeper analytics and more efficient risk assessment, helping firms make informed decisions with minimal latency.

Data Insights and Efficiency

Future-ready Capabilities

With CDW, trading firms gain a robust, high-performance infrastructure partner to help maximize speed, security and resilience — and stay ahead in today's competitive markets.



## Data Insights and Efficiency

### Enabling data-driven insights and operational efficiency

For trading firms, success depends on the ability to process massive amounts of data, automate key operations and make split-second decisions. By harnessing AI, automation and seamless integration, firms can optimize their trading strategies while improving efficiency and compliance.

#### AI-powered data management and real-time knowledge

Advanced AI and machine learning (ML) models allow firms to optimize trades, detect fraud and analyze market sentiment with greater accuracy. Real-time market data integration ensures that high-throughput data pipelines deliver actionable insights instantly, giving traders a competitive edge.

## Future-ready Capabilities

### Driving future-ready capital market capabilities

To stay ahead in an evolving financial landscape, trading firms must embrace cutting-edge technologies that enhance speed, accuracy and market adaptability. AI-driven trading, blockchain innovation and quantum computing are redefining how firms optimize strategies and manage risk.

#### AI-powered trading and market insights

Algorithmic and quantitative trading models leverage AI and machine learning for real-time market analysis, dynamic trade execution and advanced back-testing environments. Predictive AI further enhances decision-making by identifying trends and potential risks before they materialize.

### Automation and digital workflow optimization

Robotic process automation (RPA) and AI-driven workflows streamline post-trade processes such as settlement, reconciliation and compliance monitoring. Containerized microservices and serverless architectures further enhance efficiency by enabling the rapid deployment and scalability of critical trading applications.

#### Seamless connectivity and risk analytics

Secure API integrations allow trading firms to connect seamlessly with exchanges, liquidity providers and partner ecosystems for smoother operations. Enhanced risk analytics models provide real-time monitoring, scenario simulations and compliance adherence, helping firms navigate volatile markets with confidence.

### Blockchain and digital assets

Blockchain and digital ledger technology (DLT) enable faster, more secure trade clearing and settlement, reducing counterparty risk and operational inefficiencies. Firms are also exploring decentralized finance innovations, such as tokenized assets and smart contracts, to enhance liquidity and broaden investment opportunities.

#### Next-gen computing and emerging tech

Quantum computing is unlocking new possibilities in optimization problems, portfolio management and risk analysis, while edge computing accelerates real-time trade execution. By exploring these emerging technologies today, firms can future-proof their operations and gain a competitive edge.



Enhancing Experiences and Efficiency

Driving Growth

## Depository Institutions

### Strengthening core banking and credit union operations

Depository institutions must operate on a resilient, scalable foundation to meet the demands of modern banking. As customer expectations evolve and regulatory requirements increase, banks and credit unions need secure, efficient and adaptable infrastructure to support their operations.

More than **75%** of adults in the U.S. regularly use digital banking services

Source: Deloitte, "2024 Digital Banking Trends"



#### Modernizing core banking systems

Transitioning to cloud-native or hybrid core banking platforms (such as Temenos, FISERV, FIS and Jack Henry) offers greater flexibility and efficiency. API-based integrations allow institutions to offer modular financial services, and real-time processing ensures faster transactions and an improved member experience.



#### Data-driven decision-making

Centralized data lakes help institutions consolidate vast amounts of financial data, driving actionable insights. Advanced analytics improve regulatory reporting and enhance decision-making. Predictive modeling enables proactive engagement by identifying member behavior trends.



#### Cybersecurity and regulatory compliance

With increasing cyberthreats, zero-trust architecture protects sensitive banking and member data. Real-time threat detection and mitigation safeguard institutions against breaches, ensuring compliance with FFIEC, NCUA, Dodd-Frank, FDIC and CFPB regulations.



#### Payments and infrastructure modernization

To meet the growing demand for instant transactions, institutions must support real-time payments via FedNow and ACH enhancements. Seamless P2P payment integration with platforms like Zelle and Venmo enhances customer convenience. Multicloud strategies, disaster recovery automation and high-availability systems ensure financial services remain operational and scalable.



**With CDW, banks and credit unions can modernize their technology foundation — ensuring security, efficiency and compliance while delivering an exceptional banking experience.**

## Enhancing Experiences and Efficiency

### Enhancing member experiences and operational efficiency

To stay competitive, depository institutions must offer seamless, personalized member experiences while also optimizing internal processes for greater efficiency. By adopting digital banking solutions, AI-driven tools and automation, banks and credit unions can create a more responsive, streamlined environment that benefits both members and employees.

#### Digital banking solutions for seamless experiences

Intuitive mobile apps and web portals provide members with easy access to their accounts, and digital onboarding streamlines account creation and loan applications. Omnichannel engagement allows members to interact across mobile, online, branch and call center channels, offering flexibility and a consistent experience.

AI has the potential to boost banking profitability by up to

**20%** by streamlining customer service

with chatbots, strengthening fraud detection, and optimizing financial advisory services.

Source: McKinsey, "The True Impact of AI in Banking"



#### AI-driven customer and member relationship management

Advanced CRM tools powered by AI enable personalized member engagement by tailoring offers and communications based on member data. Lifecycle management ensures deeper, more valuable relationships by helping institutions anticipate and meet evolving member needs.



#### Process automation and RPA

Robotic process automation (RPA) can automate repetitive tasks such as loan approvals, "Know Your Customer" processes and other back-office functions. This not only reduces operational overhead but also frees up staff to focus on higher-value activities, improving overall operational efficiency.



#### Operational efficiency and cost optimization

Process mining tools identify inefficiencies in workflows, enabling institutions to eliminate bottlenecks and reduce costs. Streamlined workflows accelerate service delivery, making it easier for members to access services and for staff to manage day-to-day operations.



#### Risk management and resilience

Predictive analytics help institutions assess and mitigate potential risks before they become issues, ensuring smoother operations. By adopting diversified risk models, banks and credit unions can strengthen resilience against market fluctuations, economic shifts and other external factors.

## Driving Growth

### Driving growth and future-ready strategies

For depository institutions to remain competitive and innovative, they must embrace emerging technologies, strategic partnerships and new product offerings. By leveraging AI, advanced analytics, and blockchain, institutions can differentiate themselves while positioning for long-term success and growth.

#### AI and machine learning for smarter operations

AI-driven underwriting and credit scoring models improve loan approval processes by assessing risk more accurately and quickly. Fraud detection systems powered by machine learning analyze patterns in real time, enabling early identification of potential security threats and enhancing fraud prevention efforts.

#### Ecosystem collaboration and open APIs

By partnering with fintechs and regtechs, institutions can expand their service offerings and enhance customer satisfaction. API-driven integrations with payment networks and external providers enable seamless collaboration, allowing for the introduction of new financial products and services while increasing flexibility and scalability.

#### Data-driven insights and analytics

Advanced analytics empower institutions to perform detailed customer segmentation, leading to more personalized product offerings that drive engagement and retention. Additionally, dynamic pricing models help optimize profitability by adjusting rates based on market conditions, customer profiles and risk factors.

#### Future technologies for innovation

Blockchain technology provides secure, transparent transaction processes, enhancing trust and operational efficiency. Tokenized payments offer a secure method for members to perform transactions with added security and flexibility. Quantum computing is paving the way for next-gen risk modeling and complex financial simulations.

#### Sustainability and ESG initiatives

With growing interest in environmental, social and governance (ESG) factors, institutions can offer green financing options to eco-conscious members as they leverage technology to track and report on ESG metrics — helping members make responsible financial decisions.

Generative AI could deliver an additional

**\$200-\$340 billion**

in value annually across the banking industry

Source: McKinsey, McKinsey Report: “The economic potential of generative AI: The next productivity frontier”





## Insurance Firms

### Secure, scalable and resilient operations

For insurance firms, stability, compliance and operational efficiency are critical. A strong technology foundation that incorporates modern infrastructure, robust security and intelligent automation can enable firms to stay agile while ensuring seamless, reliable service for both clients and employees.

#### Cloud infrastructure for modernization

The adoption of scalable, secure cloud platforms allows insurance firms to modernize their core systems, enabling flexibility, cost-efficiency and faster deployment of new services. Cloud solutions provide the scalability required to meet evolving business demands and help ensure compliance and security across operations.

#### Cybersecurity and compliance

With the increasing volume of sensitive data, zero-trust architecture and data encryption play an essential role in protecting client information. Advanced threat detection systems help insurance firms identify and address security risks in real time, ensuring compliance with industry regulations and safeguarding against breaches.

#### Data management and governance

Centralized data lakes and master data management (MDM) provide the foundation for managing vast amounts of operational and customer data. Proper data governance ensures accuracy and consistency across the organization, supporting better decision-making and operational efficiency.

#### Automation and process efficiency

Robotic process automation (RPA) and smart contracts streamline back-office operations by automating repetitive tasks such as claims processing and underwriting. This reduces operational costs and improves processing speed, allowing insurance firms to focus on high-value activities.

#### Disaster recovery and business continuity

Cloud-based backup systems and resilient architectures ensure that insurance firms can continue operations in the event of disruptions, minimizing downtime and enabling quick recovery from any IT incidents.

#### Hybrid work enablement

Secure collaboration tools and remote access solutions allow insurance firms to support a hybrid work environment, enabling employees to collaborate effectively while maintaining data security and operational continuity.

#### Fraud detection and prevention

AI-driven fraud detection systems provide real-time monitoring for anomalies in transactions, helping firms quickly identify and prevent fraudulent activity before it impacts customers or the business.

**CDW provides the infrastructure, security and automation needed for insurance firms to maintain secure, scalable and resilient operations – empowering firms to stay competitive and compliant in an ever-evolving market.**

## Digital Modernization

### Customer-centric digital modernization

Insurance firms are transforming to enhance customer experiences and streamline operations through digital technologies. By modernizing core systems and automating workflows, firms can offer faster, more personalized services that boost customer satisfaction and improve operational efficiency.

#### Core system modernization

Modular, API-driven platforms provide the agility needed for rapid innovation and scaling, allowing firms to adapt quickly to market demands

#### Omnichannel engagement

Enable seamless communication across mobile, web, chat and voice channels to ensure a consistent and responsive customer experience.

#### Self-service platforms

Allow customers to manage policies, claims and payments independently through self-service platforms, reducing call center demand and improving satisfaction.

#### Intelligent digital workflows

Workflow automation streamlines processes like claims, underwriting and policy servicing, improving speed and reducing errors.

#### Embedded insurance and partnerships

Collaborate with insurtechs and non-insurance platforms via API ecosystems, expanding reach through embedded insurance offerings.

#### AI-driven personalization

Use AI to tailor policy offers and recommendations, creating personalized experiences that increase customer engagement and retention.

#### Gamification for engagement

Integrate gamification with rewards and interactive experiences to deepen customer loyalty and encourage active participation.

## Data-driven Growth

### Data and insights-driven growth

Insurance firms can differentiate themselves and drive future growth by leveraging advanced analytics and emerging technologies. By harnessing the power of AI, IoT, blockchain and quantum computing, firms can enhance risk management, improve customer insights and offer innovative products.

#### Advanced analytics and AI

Utilize predictive modeling, risk analysis and customer insights powered by AI to better anticipate market trends, optimize pricing and deliver tailored offerings.

#### Risk prediction models

Advanced catastrophe modeling and AI-powered actuarial tools allow firms to better assess and mitigate risk, improving underwriting accuracy and financial resilience.

#### Blockchain for transparency

Implement blockchain to increase transparency and security in claims processing and policy management, fostering trust and reducing fraud.

#### IoT and telematics for usage-based insurance

Leverage real-time data from IoT devices and telematics to create usage-based insurance products such as auto, health and property insurance, offering more personalized pricing and improved risk assessment.

#### Quantum computing for faster modeling

Quantum computing accelerates risk modeling and actuarial computations, allowing for more complex and accurate simulations and ultimately enabling faster decision-making.



**77%** of financial institutions anticipate adopting blockchain for applications in 2025

Source: PwC, "Blockchain in Banking"



Financial Services

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Make amazing happen.

## CDW Financial Services

### Amazing happens when strategy and technology align.

IT fuels business growth and innovation, but keeping up with rapid advancements while managing daily demands isn't easy. That's where we come in. CDW Financial Institutions Technology Services partners with leading providers to deliver cutting-edge IT solutions that help you stay ahead — and ease your workload.



### CDW is a trusted technology partner to more than 20,000 financial services organizations

Supports **99%** of the top U.S. banks

Supports **55%** of the top U.S. credit unions

Supports more than **7,500** U.S. capital markets firms

**115+** dedicated CDW Financial Services sellers

### Partners

As a top partner for the industry's leading hardware and software providers with a pulse on emerging technologies, we're able to offer a variety of solutions and services to meet your unique networking needs.



To simplify the complex and modernize your IT platform, contact your CDW account manager or visit [CDW.com/finance](https://www.cdw.com/finance).

