Modern Financial Services Operations Start with Trusted Data

ADEPTIA

For more than 25 years, Adeptia has helped financial services organizations automate the movement of critical business data between customers, partners, custodians, internal systems, and now AI agents. Our AI-native platform transforms fragmented files, documents, APIs, and EDI transactions into trusted, validated business data—accelerating onboarding, improving compliance, and reducing manual effort across the financial services value chain.

25+	200+	AI-Native	Real-Time
Years Fin Serv Expertise	Pre-Built Industry Connectors	Built for Humans and AI Agents	Always Current, Validated Data

Intelligent ETL Built for the Complexities of the Financial Services Industry

Adeptia helps financial institutions, retirement providers, investment managers and third-party administrators automate complex data onboarding, document processing and partner integration—creating trusted, AI-ready operations.

FINANCIAL SEGMENTS

Retirement Benefits
Reduce plan onboarding from weeks to hours

Asset & Wealth Management
Streamline custodian & advisor onboarding

Retail & Commercial Banking
Automate payments, lending & treasury flows

Investment Banking
High-volume real-time data across counterparties

Credit Unions & Comm. Banks
Modernize without replacing core systems

Private Equity & Alt. Inv.
Streamline investor & fund operations

WHY ADEPTIA

25 Years of Industry IP
- Pre-built knowledge bases, templates & accelerators
- Compliance frameworks + data standards built in
- Faster time to value than any alternative

AI Native, Not AI Bolted On
- AI transformations & business rules
- MCP and agent ready
- Natural language observability

Deploy On Your Terms
- On-prem, cloud, hosted, or hybrid
- Security & compliance for regulated industries
- Only Intelligent ETL with true on-premises



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Customer Success Story: Voya Financial

Financial Services · Retirement Benefits Enrollment

Voya Financial, Inc. is a leading retirement, employee benefits, and investment management company. Voya operates through three segments: Health Solutions, Wealth Solutions, and Investment Management — serving thousands of employers, brokers, and benefits administrators nationwide.

CHALLENGE

Voya was unable to quickly enroll employers to new health insurance plans and effectively retain them upon renewals.

This inefficiency led to missed revenue opportunities and poor customer satisfaction.

New employer onboarding required 4-5 weeks of manual effort

SOLUTION

Voya Data Connect (VDC)

Adeptia developed a scalable onboarding solution that processes employer data from multiple formats into Voya's systems of record — standardizing, cleaning, and validating data using business rules and Voya's proprietary rules engine.

- **Ingests** employee census & plan election data in XLSX, CSV, LDEx via SFTP
- **Translates** formats to a common data model, validated via Global & Employer rules
- **Delivers** data to Benefits Admin, Claims Systems & HRIS

Impact and Results

3-4 hours
onboarding time down from 4-5 weeks

2,500+
employers running 7,100+ data feeds

10x
user adoption vs. previous solution

26
data feed use cases on Adeptia

KEY TAKEAWAY

Adeptia reduced Voya's employer onboarding from 4–5 weeks of manual effort to just 3–4 hours, scaling to 2,500+ employers across 7,100+ data feeds with a fully self-service platform. This drove 10x user growth compared to the previous custom solution.

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