



Investment portal - Tokenization

Fintech | Tokenization | Blockchain

We Advise. Develop. And Deliver.

Financial Services with Enterprise-grade L1 Blockchain

An advanced fintech company is creating specific business applications on an enterprise blockchain platform. These business applications initially relate to tokenization and collateral management within financial services and involve smart contracts, market data oracles, and potential connections to external public blockchains or custodians as well as middleware and Graphical User Interface.

Overall Business Objective:

- Create and enhance applications relying on its blockchain platform
- Enhance the blockchain platform itself

The platform has won the "Best Asset Tokenization Platform"

This award highlights how aOS™ empowers next-gen autonomous finance by making assets intelligent and self-executing — bridging traditional and digital markets.

Some of the Features:

Configuring beneficial owners

Investors can legally identify themselves, which is required for subscriptions and redemptions.

Configuring payment instructions

Ability to specify fiat and blockchain payments using token bridges to connect with external ERC-20 contracts.

Subscription Flow

The process of subscribing to investment funds with e-signature integration and token distribution.

Redemption Flow

The return of invested funds while complying with all legal requirements.



Solution:

Blockchain registry for secure data storage.

Process automation through DocuSign integration for document signing.

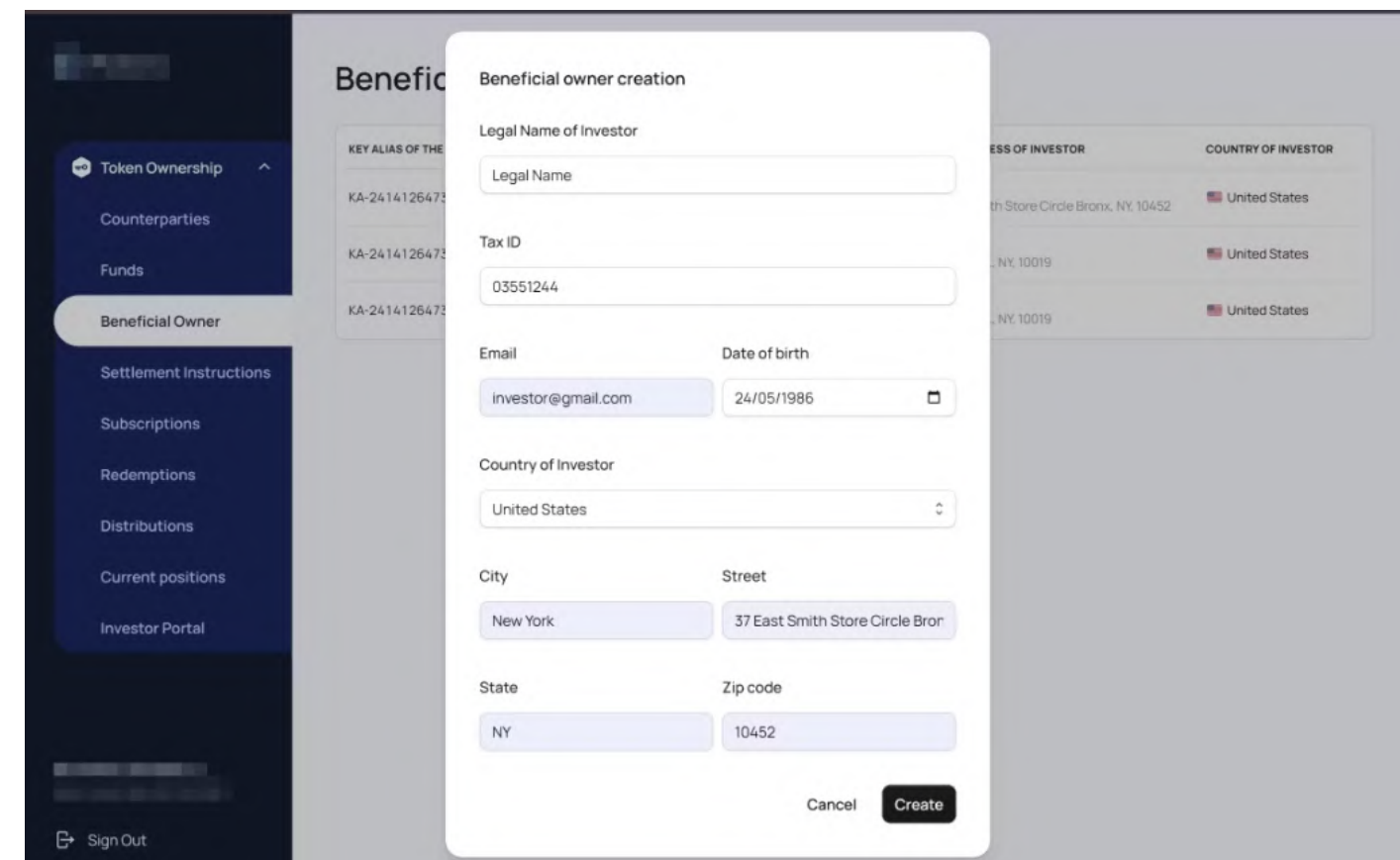
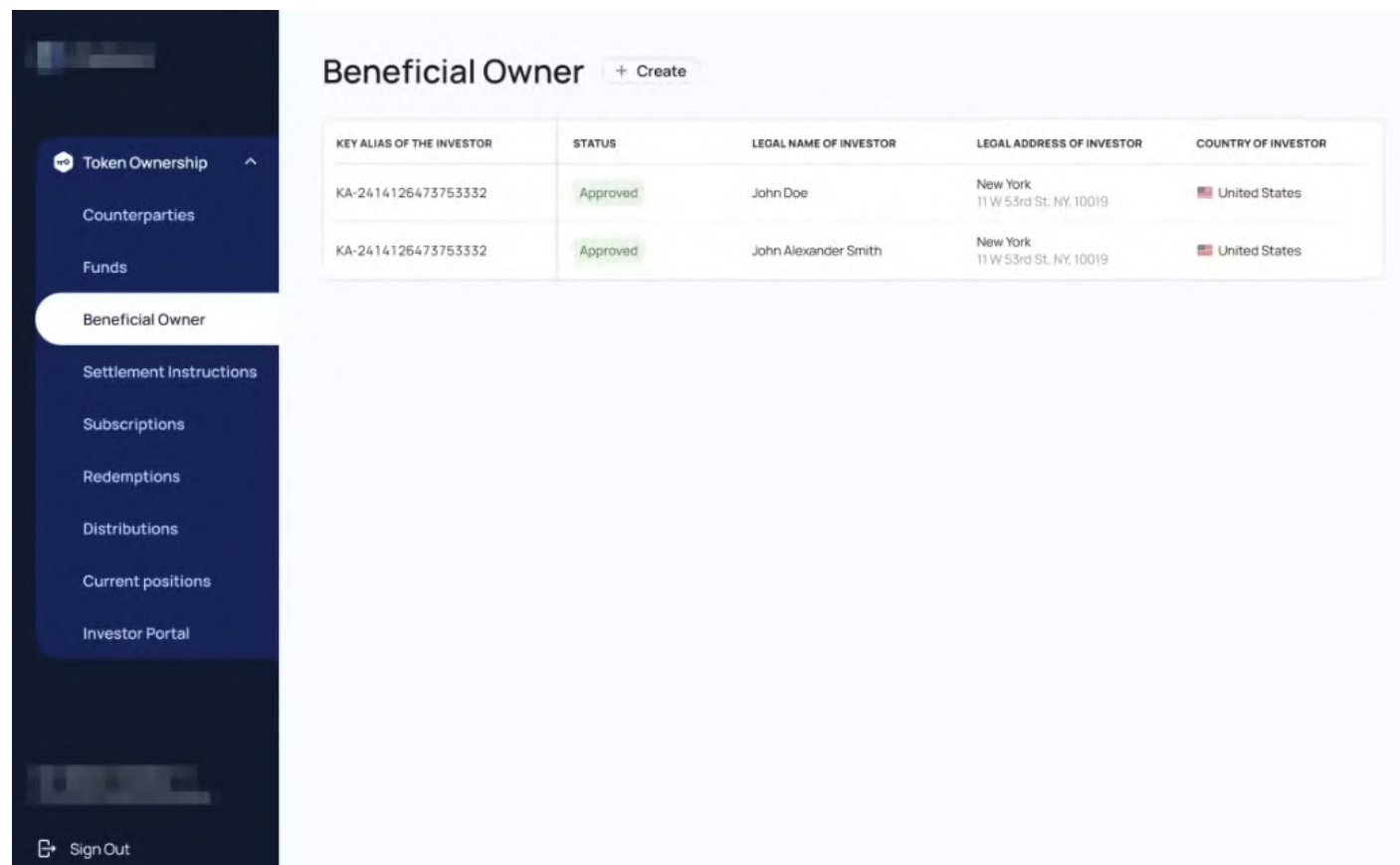
Flexibility allows users to choose participants and manage their investments independently of intermediaries.



Configuring beneficial owners

To ensure seamless and legally compliant transactions, investors can define a beneficial owner record, which is essential for subscriptions and redemptions. Through a user-friendly interface, investors enter the necessary legal information in a secure modal screen.

Once submitted, the data is securely stored on the blockchain, ensuring privacy and compliance, while remaining readily available for future subscriptions and redemptions. This streamlined process enhances both security and efficiency, offering a seamless experience for investors.

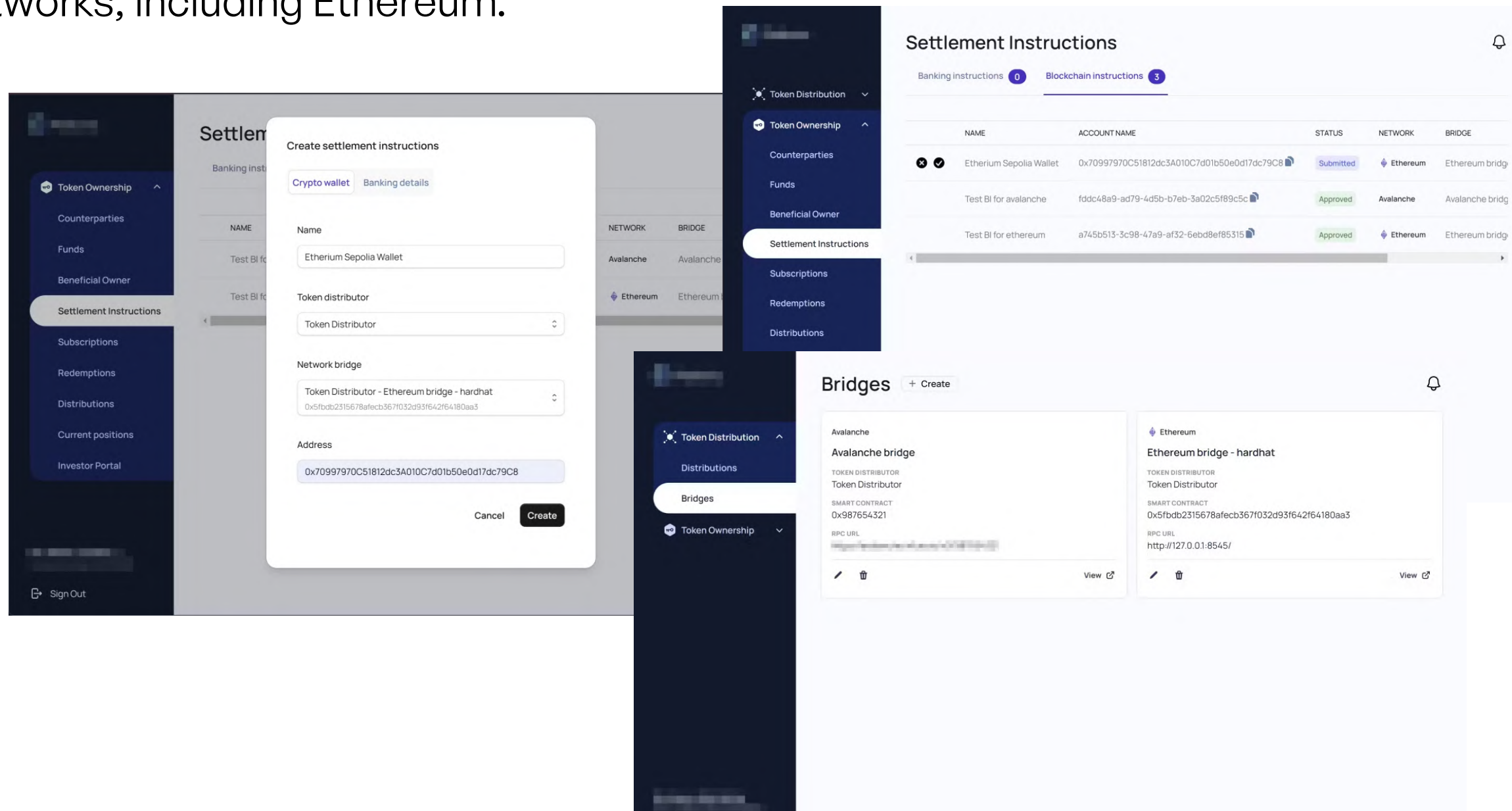


Configuring payment instructions

The platform enables investors to seamlessly specify their preferred payment instructions for distributions and redemptions, whether in fiat or blockchain-based assets. To facilitate external blockchain payments, a Token Distributor must first establish a token bridge - a key component that ensures secure connectivity between our system and external ERC-20 blockchain contracts across multiple networks, including Ethereum.

As a Token Distributor, you have full control over the token bridges utilized within the system. Managing or creating a new bridge is streamlined through our dedicated Bridges Page, allowing seamless integration and interaction with external blockchain contracts.

Once bridges are defined, external token payment instructions can be created as an Investor.



The screenshot displays the ForkJoin platform interface, showing the process of creating settlement instructions and managing bridges. The interface is divided into several sections:

- Settlement Instructions:** A modal window titled "Create settlement instructions" is open, showing fields for Name, Token distributor, Network bridge, and Address. The "Crypto wallet" tab is selected. The "Name" field contains "Ethereum Sepolia Wallet", "Token distributor" is "Token Distributor", "Network bridge" is "Token Distributor - Ethereum bridge - hardhat", and "Address" is "0x70997970C51812dc3A010C7d01b50e0d17dc79C8".
- Settlement Instructions Table:** A table showing a list of settlement instructions with columns for NAME, ACCOUNT NAME, STATUS, NETWORK, and BRIDGE.
- Bridges:** A section titled "Bridges" with a "+ Create" button, showing details for two bridges: "Avalanche bridge" and "Ethereum bridge - hardhat".

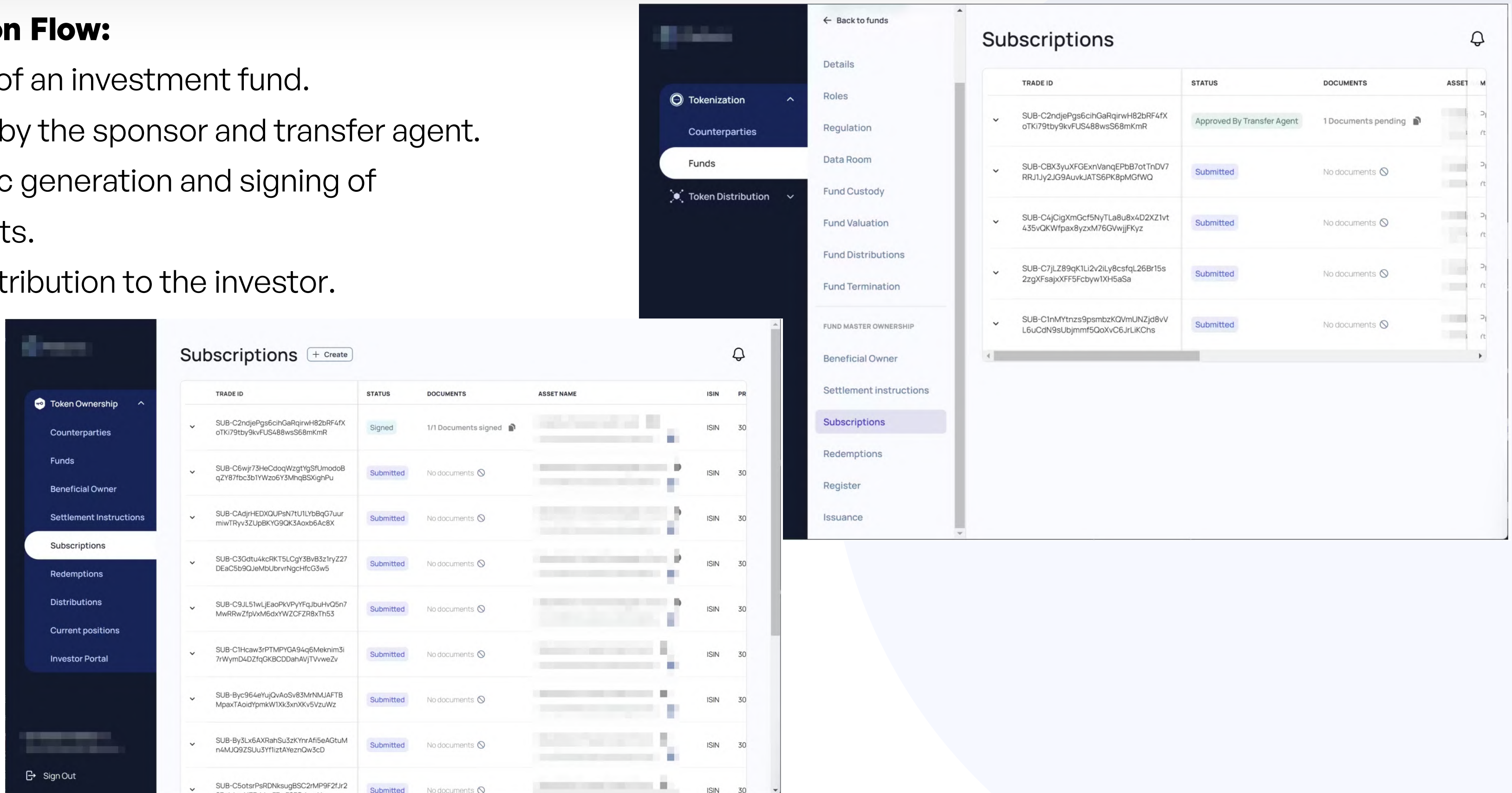
NAME	ACCOUNT NAME	STATUS	NETWORK	BRIDGE
Ethereum Sepolia Wallet	0x70997970C51812dc3A010C7d01b50e0d17dc79C8	Submitted	Ethereum	Ethereum bridge
Test BI for avalanche	fddc48e9-ad79-4d5b-b7eb-3a02c5f89c5c	Approved	Avalanche	Avalanche bridge
Test BI for ethereum	a745b513-3c98-47a9-af32-6ebd8ef85315	Approved	Ethereum	Ethereum bridge

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Subscription Flow:

- Creation of an investment fund.
- Approval by the sponsor and transfer agent.
- Automatic generation and signing of documents.
- Token distribution to the investor.



The screenshot displays the 'Subscriptions' section of the ForkJoin platform. On the left, a dark sidebar contains navigation items: Token Ownership, Counterparties, Funds, Beneficial Owner, Settlement Instructions, Subscriptions (highlighted), Redemptions, Distributions, Current positions, and Investor Portal. At the bottom of the sidebar is a 'Sign Out' button.

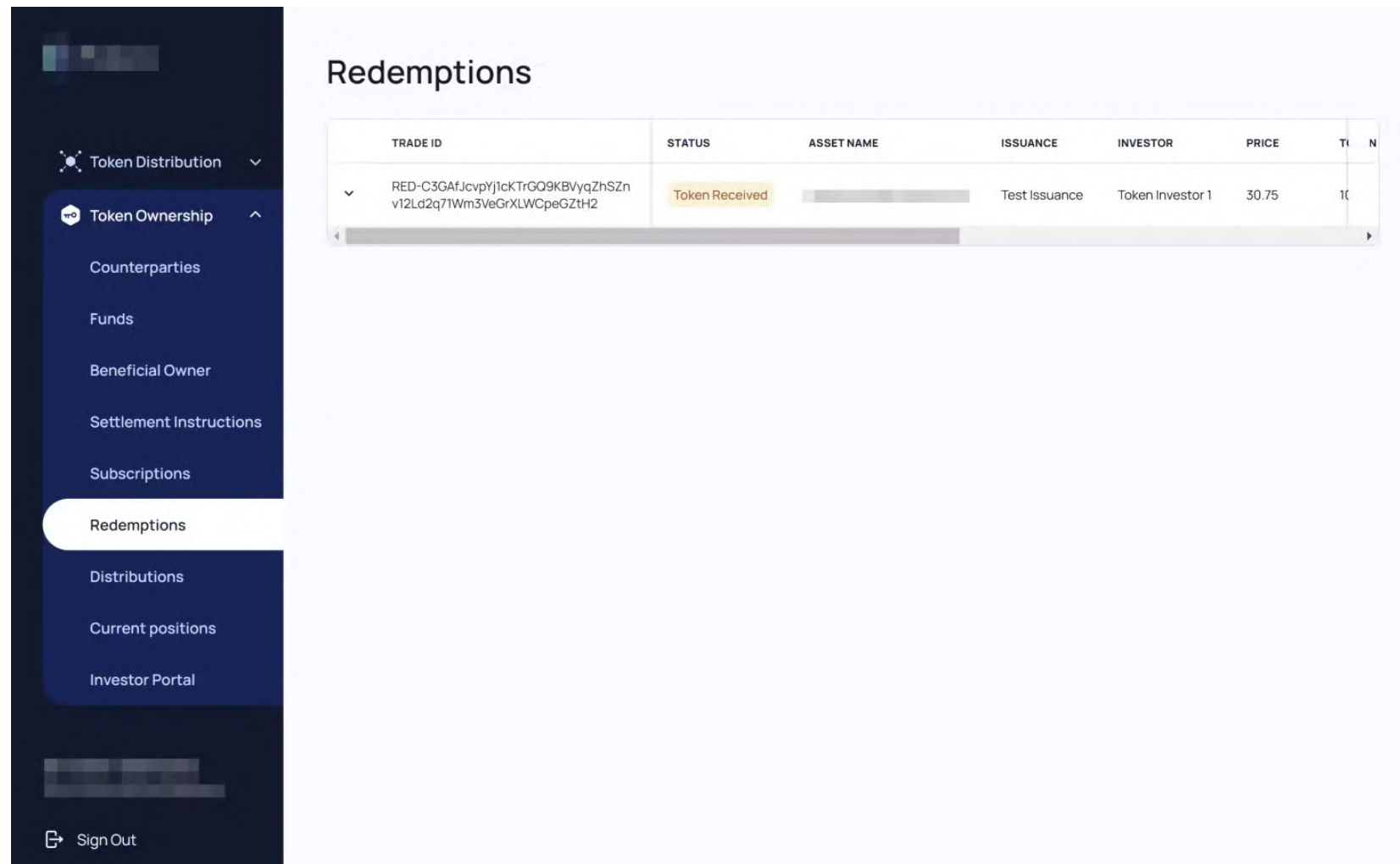
The main content area shows a 'Subscriptions' table with a '+ Create' button and a notification bell icon. The table has the following columns: TRADE ID, STATUS, DOCUMENTS, ASSET NAME, ISIN, and PR. The data rows are as follows:

TRADE ID	STATUS	DOCUMENTS	ASSET NAME	ISIN	PR
SUB-C2ndjePgs6chGaRqirwH82bRF4fXoTKi79tby9kvFUS488wsS68mKmR	Signed	1/1 Documents signed	[Redacted]	ISIN	30
SUB-C6wjr73HeCdoqWzgtYgSfUmodoBqZY87fbc3b1Ywzo6Y3MhqBSXghPu	Submitted	No documents	[Redacted]	ISIN	30
SUB-CAjHEDXQUPsN7tU1LYbBqG7uurmiwTRyv3ZUpBKYG9QK3Aoxb6Ac8X	Submitted	No documents	[Redacted]	ISIN	30
SUB-C3Gdtu4kcRKT5LcgY3BvB3z1ryZ27DEaC5b9QJeMbUbrvrNgcHfcG3w5	Submitted	No documents	[Redacted]	ISIN	30
SUB-C9JL51wLJEaoPKvPYFqJbuHvO5n7MwRRwZfpvxM6dxYWZCFR8xTh53	Submitted	No documents	[Redacted]	ISIN	30
SUB-C1Hcaw3rPTMPYGA94q6Meknim3i7rWymD4DZfqGKBCDDahAVjTVweZv	Submitted	No documents	[Redacted]	ISIN	30
SUB-Byc964eYujQvAoSv83MrNMJAFTBmpaxTAoidYpmkWXk3xnXv5VzuWz	Submitted	No documents	[Redacted]	ISIN	30
SUB-By3Lx6AXRahSu3zKYnrfi5eAGtuMn4MJ09ZSUu3Yf1ztAYeznOw3cD	Submitted	No documents	[Redacted]	ISIN	30
SUB-C5otsrPsRDnksugBSC2rMP9F2fJr2	Submitted	No documents	[Redacted]	ISIN	30

On the right side of the interface, there is a secondary 'Subscriptions' view with a similar table structure. This view includes a 'Back to funds' link and a list of navigation options: Details, Roles, Regulation, Data Room, Fund Custody, Fund Valuation, Fund Distributions, Fund Termination, FUND MASTER OWNERSHIP, Beneficial Owner, Settlement instructions, Subscriptions (highlighted), Redemptions, Register, and Issuance.

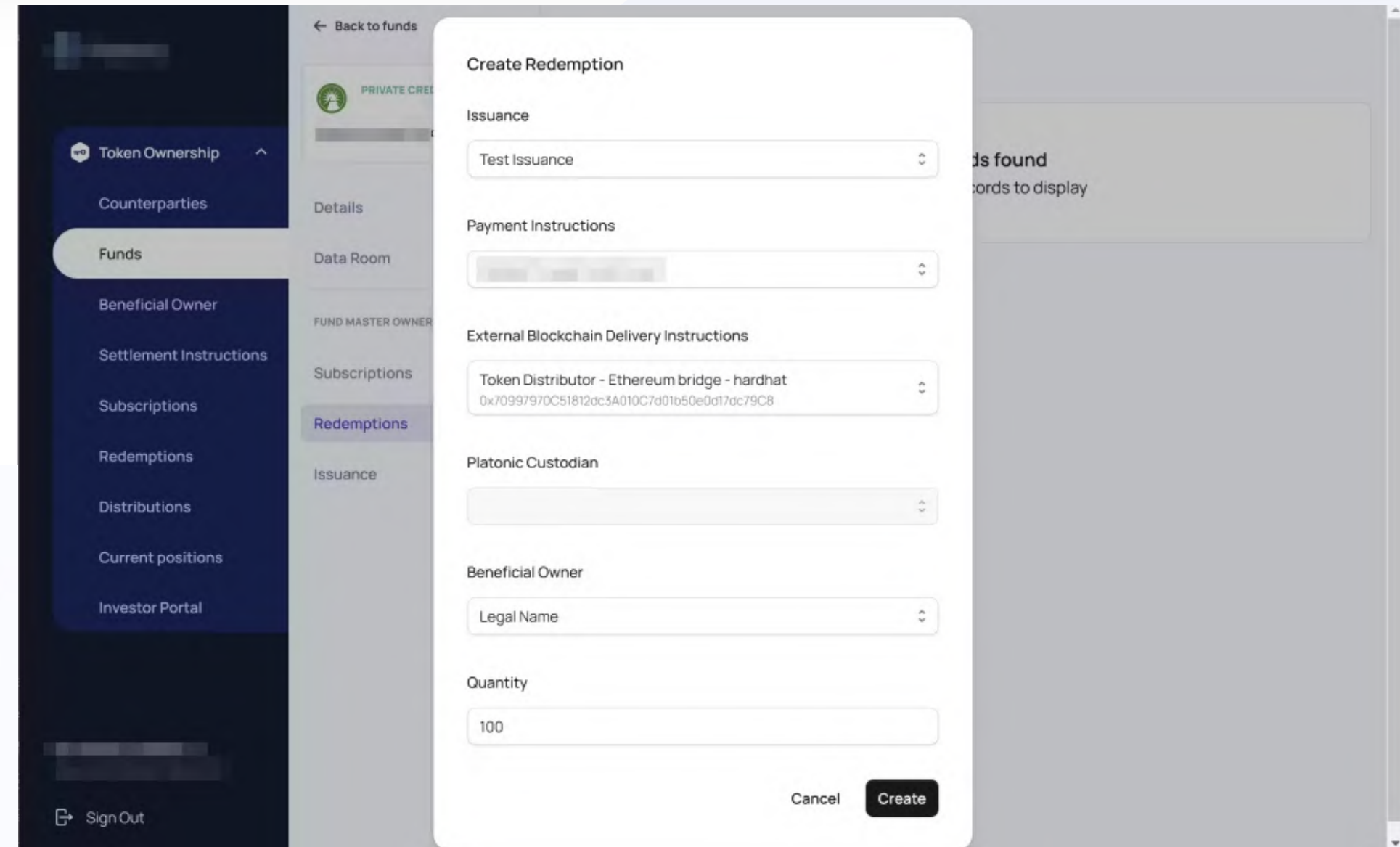
Redemption Flow:

- Redemption request initiation.
- Approval by the transfer agent and custodian.
- Token transfer to the sponsor's address and process completion.



Redemptions

TRADE ID	STATUS	ASSET NAME	ISSUANCE	INVESTOR	PRICE	T	N
RED-C3GAFJcvpYj1cKTrGQ9KBVvqZhSZn v12Ld2q71Wm3VeGrXLWCpeGZtH2	Token Received		Test Issuance	Token Investor 1	30.75	10	



Create Redemption

Issuance: Test Issuance

Payment Instructions: [Redacted]

External Blockchain Delivery Instructions: Token Distributor - Ethereum bridge - hardhat
0x70997970C51812dc3A010C7d01b50e0d17ac79C8

Platonic Custodian: [Redacted]

Beneficial Owner: Legal Name

Quantity: 100

Buttons: Cancel, Create

Results:

Enhanced security through blockchain utilization.

Transparency and control for investors and sponsors.

Process optimization in subscriptions and redemptions.

Integration with external blockchain networks for expanded capabilities.



Our Leadership Team





CEO



Michael Glazer

Michael has 25+ years experience in US Capital Markets. Over his career he held many different technical roles in Software Development, Solution Architecture and Delivery Management. Well-known key engagements included **FXall**, **Intercontinental Exchange** and **ENSO Financial** (Nex Group), and **GFT**.



Anton Moiseev

Anton has over 15 years experience with FinTech and Insurance projects, including leading insurance broker platform **SuranceBay**. Anton has a deep track record leading development teams and delivering production systems. Anton is also a Technical SME, contributing to open source projects, conducting webinars and co-authoring books.

Key open source creator for [Dart.dev](https://dart.dev) (later [Flutter.dev](https://flutter.dev))

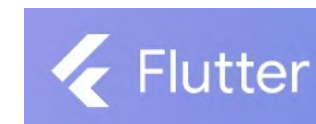
Key architect and designer for <https://www.surancebay.com/>.

Notable **Manning Publications**:

[TypeScript Quickly](#)

[Angular Development with TypeScript, Second Edition](#)

[Angular 2 Development with TypeScript](#)





VP of Engineering



Michael Musatov

Michael is a Lead Development Manager with 15+ years of experience working on successful projects in Insurance, including leading insurance broker platform **SuranceBay**, FinTech and Telecommunications industries. Michael has strong skills in designing and implementing robust and simple solutions to solve complex real-life business cases with a rich variety of technologies including both Java and .NET platforms.

- MCPD: Windows Developer
- MCPD: Web Developer
- MCPD: Windows Azure Developer
- MCTS: .NET Framework, Web Applications
- MCTS: .Net Framework, Data Access
- MCTS: .NET Framework, Service Communication



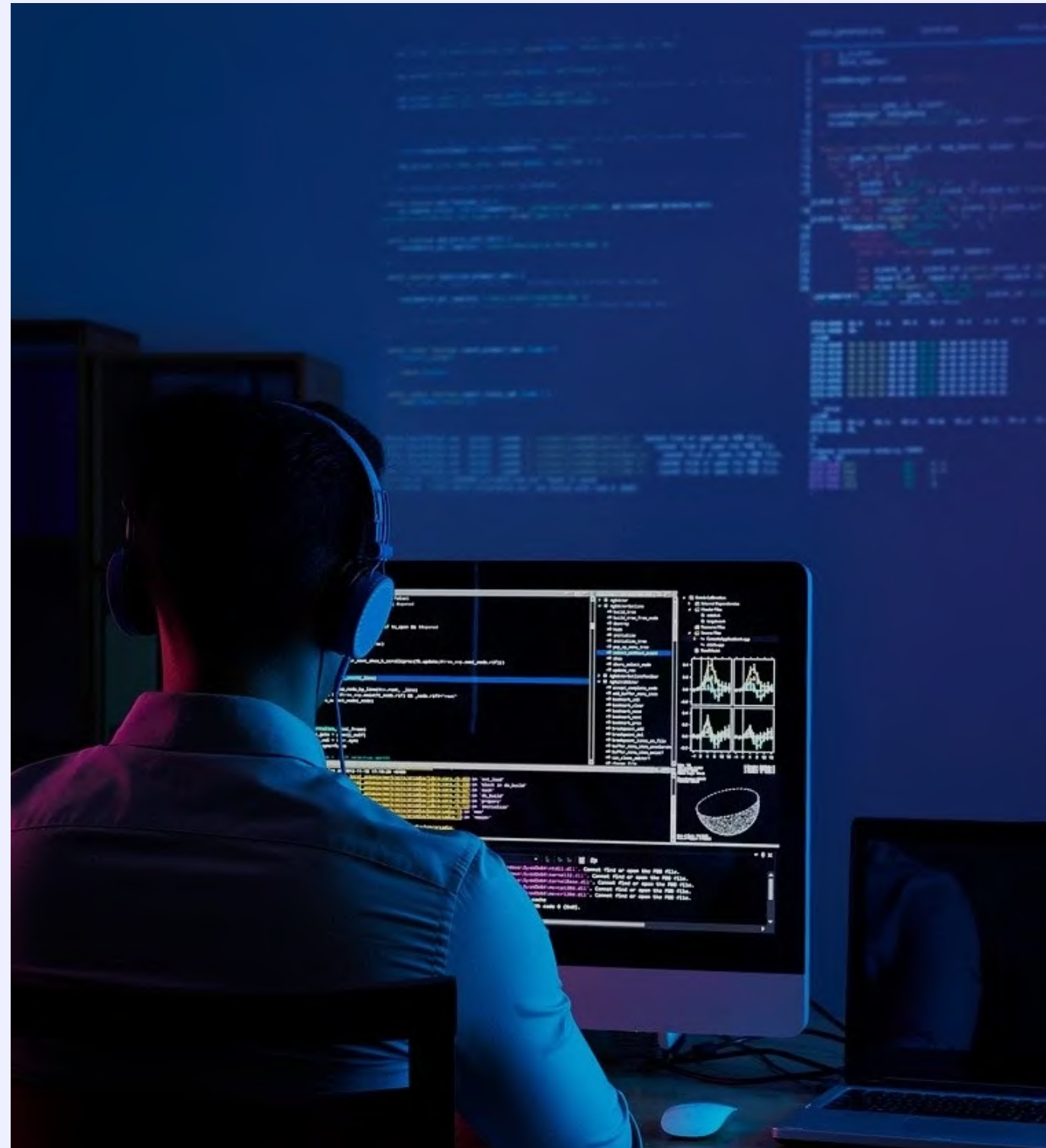
Platonic

meetperry



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INSURANCE. SIMPLIFIED.

References



Capital Markets - ENSO Financial Analytics acquired by NEX (part of ICAP) and by Hazeltree

Functionality: Web Workflow, Reporting, Compliance, Market Data
Voted "Most Innovative Hedge Fund Platform" by Hedge Fund Magazine 2 years in a Row



Private Equity - Meetpery

Functionality: Web & Mobile Investor's Portal, Fund Transfer, Reporting



Assets Tokenization - Platonic (former Symbiont)

Functionality: Financial services with Platonic's enterprise-grade L1 blockchain.



Quantitative Trading - Epsilon Services

Functionality: Rich Real-Time Trading, Position Management



Telecom - REW - Tampa-based consulting firm focused on telecommunications

Functionality: Billing, SMS Notification, Customer Portals for large Users

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