AIPIVT

Replace the trading platform one component at a time.

12 checks before you retire a live broker platform, with clients still trading on it.

Clients keep trading on the old platform until their component or account group moves.
This page is not a quote, not an estimate, and not regulatory advice.

Map

1. List every component and integration production actually runs: the trading server, the liquidity bridge, price feeds, CRM, client portal, payment providers, KYC, back office, and reporting. Take the list from the configuration and the network, not from the vendor's diagram.
2. Every component that touches client money runs in parallel with the old one and is reconciled daily, per account, to the cent: balance, equity, margin, swap, and commission. Nothing switches until the numbers match.
3. The behaviour nobody wrote down is listed: when swaps and triple swaps book, how commission rounds, margin call and stop-out levels per group, the server timezone, and symbol specifications. Until someone decides otherwise, it is part of the contract.
4. During the move, each record type has one writer. For clients, accounts, deposits, and trades, one system writes and the other reads. Never two writers.

Replace

5. Components around the trading core go first: CRM, client portal, payments, back office, reporting. The trading core goes last, on its own milestone. Clients keep trading on the old server until then.
6. Every replaced component has a way back: one switch returns its traffic and its data flow to the old component, and that switch is tested before go-live.
7. Clients do not notice the move: the same login, the same account numbers, the same statement history, the same payment methods. Nobody repeats KYC because the CRM changed.
8. The trading core moves in waves. New accounts open on the new core first. Existing account groups then move one weekend window at a time, each after a dry run that reconciles positions, pending orders, and balances. Groups with symbols quoted over the weekend need their own window.

Switch off

9. The regulatory reports you file today keep the same content and the same schedule through every switch. Your compliance officer signs off each switch.
10. Before anyone claims the new platform is cheaper, write down what the old one costs: licence and vendor fees per component, and the hours your team spends on manual reconciliation each month.
11. One person on your team is named for each replaced component and can change it without the people who built it.
12. The old platform is switched off one component at a time, and the last licence has an end date. Running both forever is two platforms and two bills.

AIPIVT. A replacement is a sequence of fixed milestones. The first is shaped for four weeks: the sequence decision and one replaced component.