

How are you onboarding new clients?

INFORM™

High velocity client onboarding

VS

OLD SCHOOL

Paper-based onboarding

Meet anywhere

Walk your client through the process on tablet or laptop. Build a relaxed, client-first connection from the start.



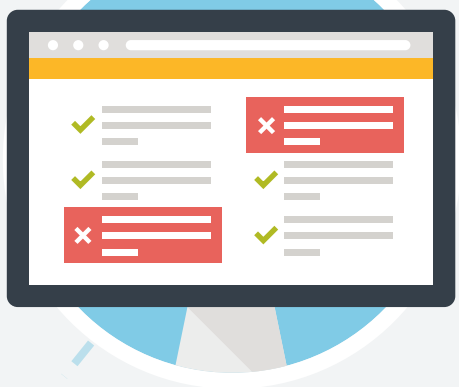
Online makes it easy

With pre-populated data, easy-click from one form to next, and in-built error-checking, INFORM™ make it easy, interactive, and collaborative.



Automated and error proof

Online warnings notify of errors, checklists ensure completeness.



Capture of client data is accurate, easy and electronic

Simplicity appeals to new onboarding clients plus current clients adding accounts.



Digital signing & security

Easy, electronic, highly secure. Support for optional, automated Know Your Client checks.

Two awkward choices

ONE Client receives bulky package by mail, with requirement to sign in multiple places
TWO Client wades through paper forms with advisor in person. Either way – it's old-school and error-prone!



Paper chaos

Too often, in the paper-based system, errors creep in or steps are missed.



Paper-bound process is inherently unstable

Need for physical signatures makes it impossible to use electronic aids such as error-finding and checklists.

Why start off with errors and irritation?

Paper-bound nature of the process leads to high incidence of errors, additional mailings, client frustration, delays, wasted advisor time, and the need for more signatures. An inauspicious start!



Low security High risk

Upon completion, all forms must be delivered in-person or faxed to compliance officer. Often, paperwork is sent through insecure email.



RESULTS

LET'S WORK TOGETHER!

Positive experience all around.
An easy, convenient, intuitive process for both client and advisor.

A DISCOURAGING START.

Cumbersome, error-prone, inconvenient and frustrating for both client and advisor.