How are you onboarding new clients?

**Inform™**
High velocity client onboarding

**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 built-in features like INFORM™ make it easy, interactive, and collaborative.

### Automated and error proof
Omnipresent control of errors, checklists ensure completeness.

### Digital signing & security
Easy, efficient, online, support for optional, automated time frame. Client’s choice.

### Two awkward choices
1. Two choices: fully online lead to mix with requirement to sign in multiple places.
2. Client leads through paper forms and advisors in person. Either way – it’s old-school and error-prone!

### Paper chaos
Yuck! Noisy, in the paper-based paper, messy, banned in stark environments.

### Capture of client data is accurate, easy and electronic
Simplicity appeals to new without drag. Client gets control, advisor adds records.

### Paper based 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 based process is high incidence of errors, additional mailings, client frustration, advisor’s time and this leads for more signatures. An inauspicious start!

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

### RESULTS

**INSIGHTS**

- **Positive experience all around.**
  - Easy, convenient, intuitive process for both client and advisor.

**IDEAS**

- **Capture of client data is accurate, easy and electronic**

**EXPERTS**

- **Inform™ High velocity client onboarding**

**VS**

- **Old School Paper based onboarding**

**Low security, High risk**

- **Low security, High risk**

**1.** Let’s work together! A discouraging start.
2. A discouraging start. Cumbersome, error prone, inefficient and uncomfortable — for both client and advisor.

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