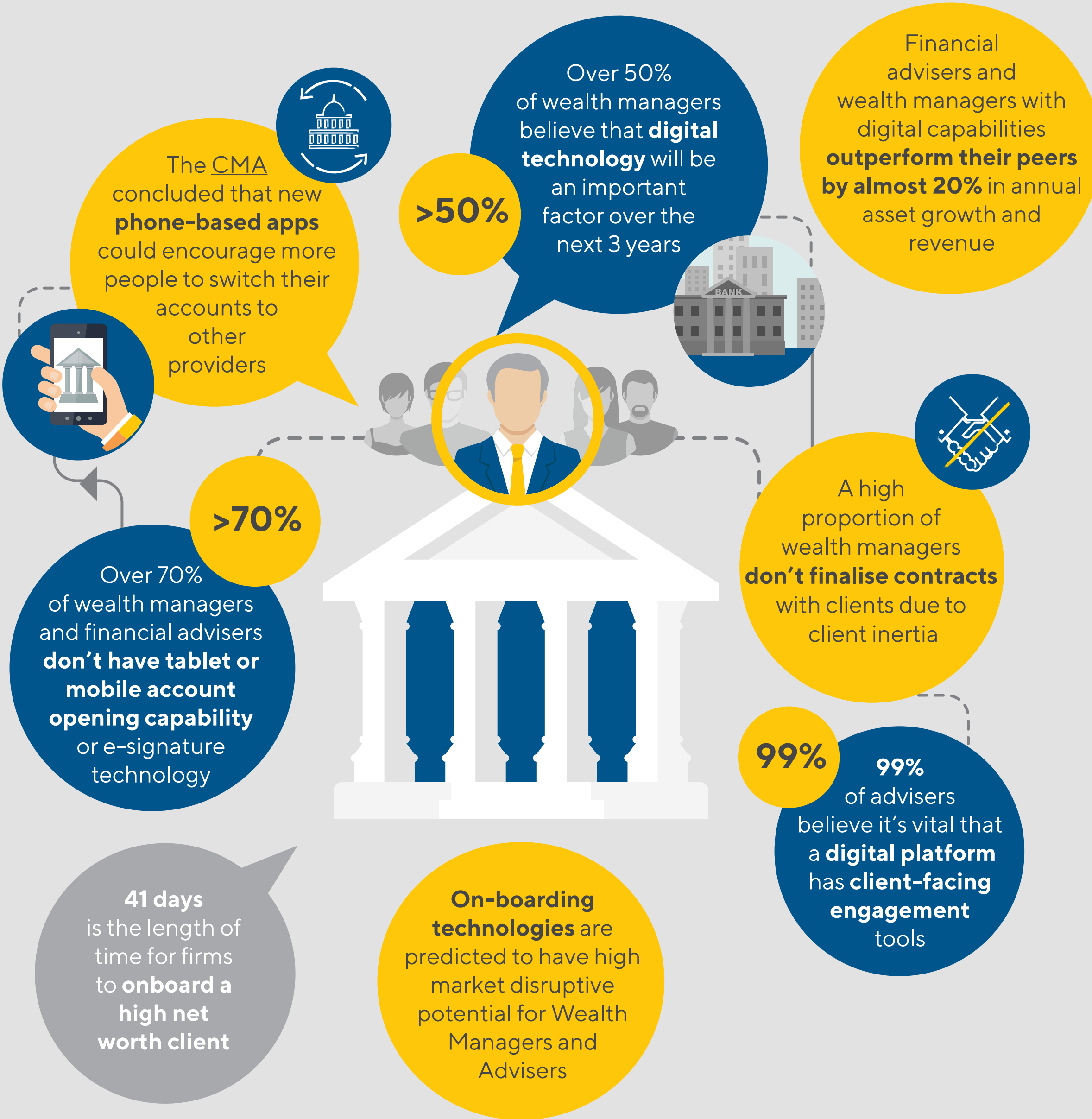



Wealth Management and Financial Advisory Firms

Best Practices for Onboarding and Serving High Net Worth Clients



Did You Know It Takes...


5.4 hours
to screen
a high net
worth client

Enable automated
collection and validation
of customer information


\$15,000
to verify
a high net
worth client

Minimise disruption
to your ongoing
business operations


41 days
to onboard
a high net
worth client

Reduce onboarding
time and complexity

The stringent regulatory environment and increased investor demands continue to put pressure on operating models and revenues. Initial customer engagement (KYC / Account Set up / ID capture and form completion) is one of the most laborious and time consuming areas of the customer journey for wealth managers and clients alike.

A great onboarding journey is vital to your customers and to the success of your firm. Embracing digital onboarding technology means that wealth managers, adviser firms and platforms can reduce client inertia and speed the process resulting in faster time to revenue, reduced costs, and increased profitability.

Mobile technology makes this possible whilst also helping you increase regulatory compliance. Start to differentiate your firm and optimise your client's first experience of doing business with you today.

Download your free copy of Harnessing the Power of Digital in Wealth Management Client Onboarding