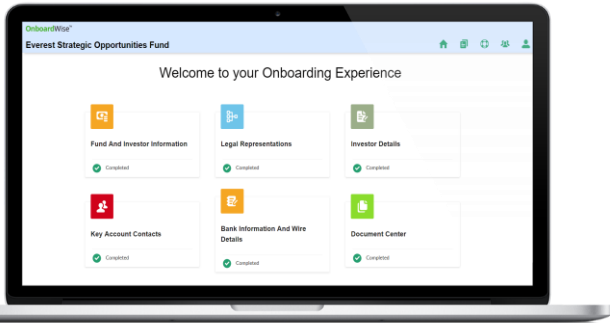




FSConnect

Onboardwise

A digital onboarding platform powered by Salesforce, designed to transform complex, manual, paper-based processes into a simple, digital, and differentiated client experience.



FEATURES

All-digital, end-to-end platform

Dynamic platform with paperless business processes for client onboarding and related transaction including document sharing, virus scans, and e-signature

Main feature

Customization and management modules for business users to tailor questions in alignment with changing company policies, regulations, and other mandates at each step

Customizable branding

Customizable visuals to include corporate branding preferences to ensure a consistent branding experience for clients

Documentation management

Collection of necessary documentation via electronic uploads and e-signature for consent and record keeping

Access anywhere design

24*7*365 consistent information availability across devices to provide a quick, easy and secure customer onboarding and management experience

Cross collaboration

Connectivity with 3rd party providers including transfer agents, fund admins etc.

BENEFITS



Provide a **differentiated experience** using an Intuitive, personalized and easy-to-use guided portal for both customers and business users



Enhance **operational efficiency** through simplified and accelerated processes, with resource time savings redirected for higher value activities



Enable **digital transformation** via a centralized digital platform with an easily configurable framework providing agility and speed to market



Fast-track **return on investment** by reducing cost exposure from compliance checks and regulatory reports along with lower error rate

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