

Advisor360° Digital Onboarding

Provide seamless, modern account opening and deepen client relationships, create greater business efficiency, and produce faster growth for your practice.

Time-consuming and error-prone onboarding of clients has been the hallmark of financial advising. While moving onboarding into the digital world has improved the experience compared to traditional paper and pen methods, it has continued to be riddled with challenges. Until now.

Advisor360°'s Digital Onboarding, now part of Advisor360°'s Enterprise offering, redefines how financial advisors onboard clients by simplifying and speeding up the time it takes for clients to benefit from financial recommendations or new products.

The screenshot displays a web-based onboarding interface. At the top, it shows the user's name 'Martinez, Tomas & Maria'. The interface is divided into several sections: 'Account Selection' with a list of accounts including 'PARTOS', 'TOMAS MARTINEZ', and 'MARIA M. MARTINEZ'; 'Optional Features' with checkboxes for 'Money Movement', 'Transfer of Assets', 'Standing Instructions', and 'Action by'; and 'Transfer of Assets' with fields for 'From Name', 'Transfer Type', and 'Account Number'. A blue vertical bar on the right side of the image contains the text: 'Advisor360° Digital Onboarding redefines how financial advisors onboard clients'.

“I opened my first account yesterday—an IRA—and Digital Onboarding is a game changer!”



Joan Bernardi
Operations Manager,
Crabtree Financial
Services

“The new Digital Onboarding capability is definitely a modern and efficient experience.”



Sue Romaine
Client Service Manager,
Blue Hills Wealth
Management

The results are impactful for your advisors' practices



Deeper client relationships

Clients spend less time inputting their information multiple times on numerous forms, correcting inaccurate information, inputting information your advisors already asked them for previously, and asking for help on next steps that aren't clear. With less friction in the process and greater relevancy to their needs, clients will build deeper relationships with your advisors.



Faster growth

With an account opening process that takes as few as 90 seconds, prospective clients quickly become signed clients who start generating revenue for practices faster than ever.



Greater efficiency

Not only are clients more efficient in opening accounts, but so are you and your advisors. Gone are the days of tracking down resources to set up the onboarding process to your liking, gathering all the required paperwork from different financial institutions, chasing clients for completed paperwork, and dealing with the back and forth on approvals with the home office. With all these steps automated, your advisors can spend more time on what they do best: growing their books of business.

Leverage the powerful capabilities of Digital Onboarding

Advisor360's Digital Onboarding enables your advisors to:

- **Easily configure the account opening process to reflect the unique needs of your advisors' businesses, offerings, and regulatory requirements.** The type of questions your advisors would like to know about their clients are unique, and so should be your onboarding process. With Advisor360, they can configure disclosure questions, add and edit registration types and business lines, and adjust workflows to meet business requirements and policy changes.
- **Streamline the process for your advisors' clients to sign necessary upfront forms by bundling all required paperwork together and presenting for electronic signature.** Enable your advisors to automatically pre-fill data on all required account forms, MSAs, and optional feature and funding forms, increasing accuracy and expediting account opening, and bundle together account-related forms, including required paperwork from financial institutions, to send to clients for electronic signature with DocuSign®.
- **Track and act on all new business in one central dashboard, simplifying the management of new accounts, including speeding up account closures.** Your advisors can view all account numbers, paperwork, and statuses, and take actions on paperwork bundles, such as prompting clients for e-Signature, editing recently created accounts, launching a client's household to take further action if needed, and tracking paperwork at the home office.
- **Automate processing of account information, eliminating the need for manual steps by the home office.** Your advisors can send eligible case types straight to principal and automate manual steps needed for account approval, automating discretion, trading authority, and other custodial-related coding when new accounts are created or changed.