The end-to-end investor onboarding process
with Thomson Reuters fund formation capabilities

Turn manual efforts and delayed processes into automated workflows and stronger client relationships

HOW IT'S POSSIBLE:

1 Onboard — Intake forms with logical instructions to collect all information for all investors managed per fund, including KYC

2 Review — Create workload boards and dashboards for full insight of all incoming requests and automation rules

3 Draft — Draft & Create documents based on the investor profile information collected

Workflows to automate document production

4 Close — Collect and create all documents and store them in a single place

5 Sign — Create workflows to automate the signing process

OUTCOMES ACHIEVED:

$ Greater efficiency in managing the investor onboarding process

Automation of the onboarding, drafting and signing process

Save time on the complex investor onboarding process

Reduce risks when capturing investor information required for regulatory compliance

Deliver a superior client experience

Simplify the investor onboarding process with next-generation technology

THOMSON REUTERS®