

# Digital Onboarding in Wealth Management

**When delivering a highly personalised and efficient investor experience, onboarding new wealth clients remotely and securely is critical to success.**

## **Why does wealth management need Digital Onboarding?**

Traditional wealth management firms, private banks, and online brokers, as well as new innovative WealthTech firms, are investigating smarter ways to embrace digital transformation. The shift to more digitally-focused relationships creates an opportunity for wealth firms and advisors to differentiate their strategy and offer a well-delivered digital proposition. This can improve the overall client experience, from opening an account, to decision making, trading, and market monitoring.

To provide a highly effective and personalised investor experience, whilst seamlessly onboarding new clients remotely and securely, knowing your client is a critical step.



**LSEG** RISK  
INTELLIGENCE

## Experience LSEG Digital Onboarding

LSEG Digital Onboarding enables wealth managers to quickly engage new prospects and start building valuable, trusted relationships, regardless of the client's location.

Our Digital Onboarding solution supports the end-to-end customer journey. You can configure this low/no code solution to your business' specific requirements to support your growth objectives, comply with regulation, and improve the client experience.

### Flexible and easy to integrate

Reduce abandonment of onboarding prospects with an intuitive and simple user interface, designed to easily integrate with your systems and rapidly grow your client base.

### Expansive coverage

Validate all types of ID documents from around the world to reduce manual workload and room for error. Moreover, leverage LSEG data-sources to verify individuals' identity, including name, addresses, etc. in seconds.

### The digital powerhouse

No other organisation has such a broad range of solutions for Wealth Managers, leading content & analytics in ESG Scores, Sentiment Scores, Stock Ratings, Videos, Company Data, Mutual Fund Data, Global News – now, expanding to a digital onboarding platform.

## Why use Digital Onboarding

A seamless digital experience

- Increase client conversion rates and maximise revenue through a world-class, onboarding user experience
- Retain a competitive edge by being able to adapt your client journeys quickly in our low/no code environment, without dependency on your in-house technology stack/teams
- Create personalised, high-converting onboarding experiences quickly and with minimal effort
- Reduce integration headaches, streamlining multiple checks and verification processes in a single API
- Achieve cost savings through automation of manual processes in the current client onboarding process and a reduced number of referral cases that require manual review
- Extend your reach by onboarding clients across the globe seamlessly through digital channels

For more information on Digital Onboarding, please visit our [website](#).

## Solution capabilities

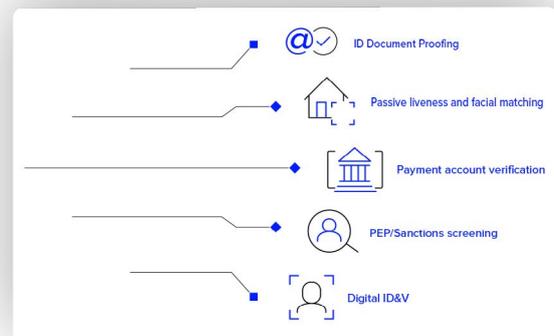
### Responsive Web App

Delivered using a **fully branded, optimized, high converting,** user experience



### Powered by LSEG Services

Harness LSEG's collective experience and data services by utilizing 'out of the box' connectivity with our Screening, Digital Identity and Fraud Prevention Solutions, imbedded into customer journeys using industry best practices.



### Easy to integrate and quick to start using

- **Get a unique link:** with just a few lines of code you can request a link via API to initiate the onboarding process.
- **Share the link with users:** share the link as part of your existing journey or via other channels like email or sms.
- **Download the results:** collect information provided by your customer, verified by LSEG, via a simple API.

