

Fenergo Client Lifecycle Management

Digitally manage clients through every stage of the client lifecycle - from initial onboarding & Know Your Customer (KYC) to ongoing KYC reviews and client offboarding.



The Challenge

Financial services clients expect simple, fast and efficient digital journeys.

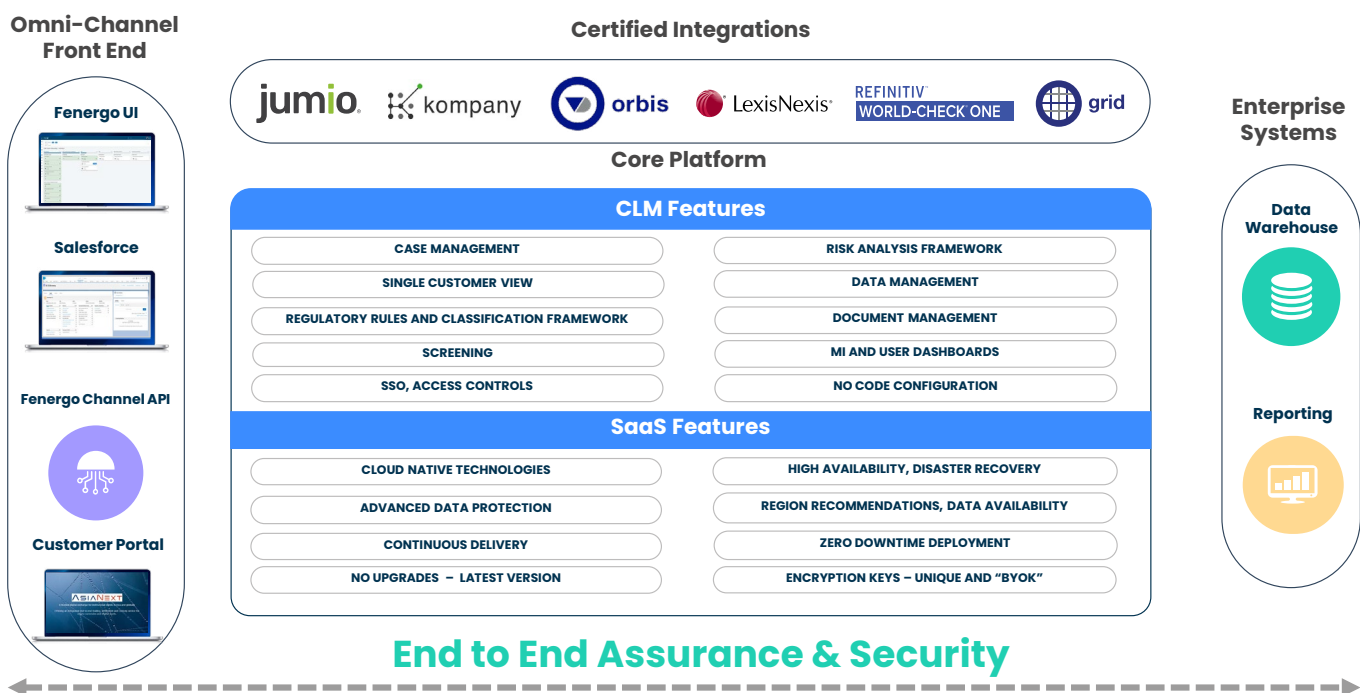
However, financial institutions must gather and validate detailed information about all clients to serve their needs, ensure regulatory compliance and stave off the threat of financial penalties for non-compliance. This creates significant operations inefficiencies and a client experience that is high-touch, time-consuming and deeply unsatisfactory.

To satisfy regulatory requirements and reduce potential client churn, financial institutions need a digital solution that streamlines client onboarding journeys and automates financial crime and regulatory compliance processes.

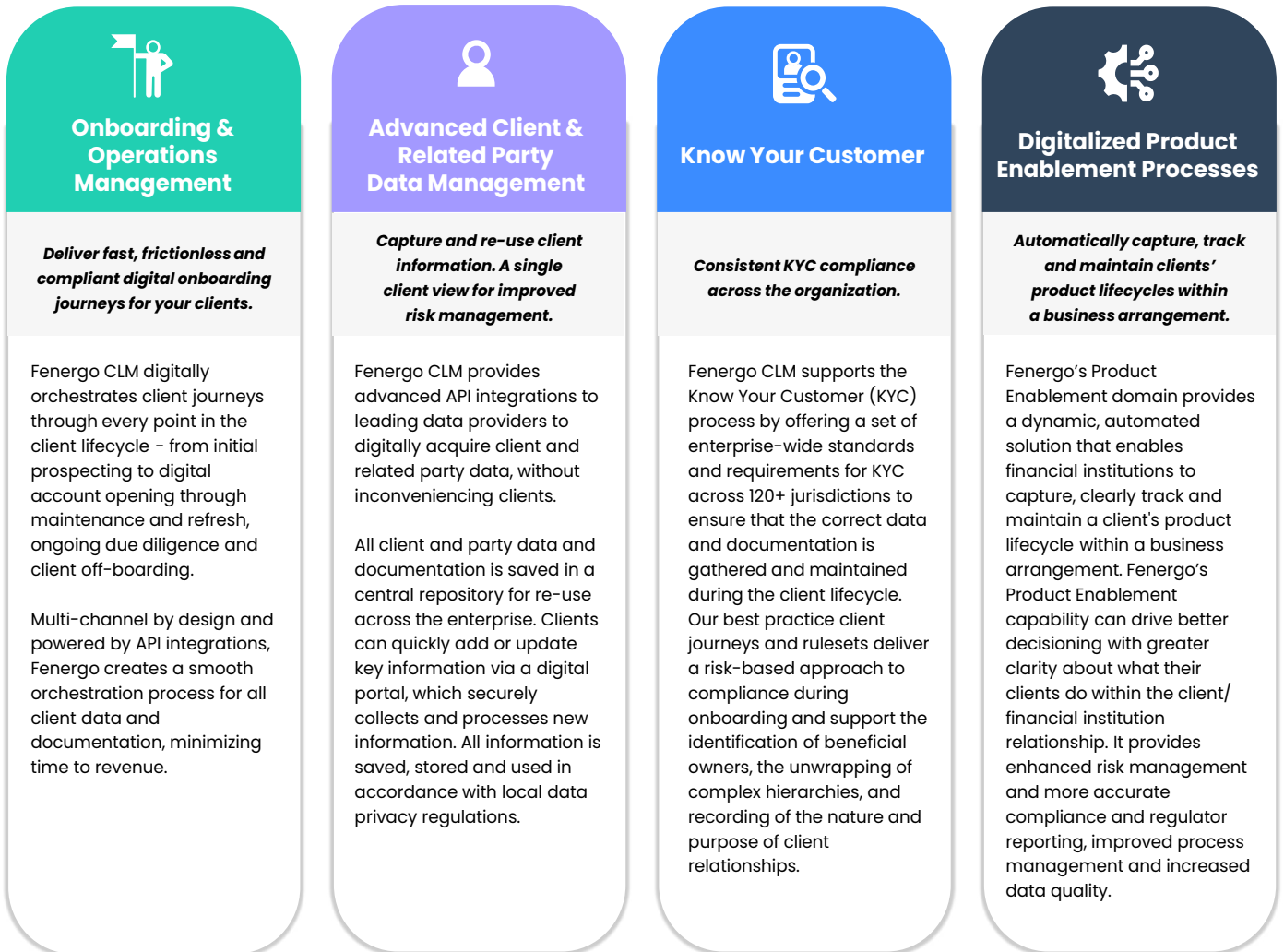
Transform the Client Lifecycle with Fenergo CLM

Fenergo Client Lifecycle Management (CLM) enables financial institutions to transform the end-to-end client onboarding and lifecycle experience, future-proof regulatory compliance and enhance operational efficiency.

It digitally orchestrates client journeys through every point in the client lifecycle - from initial prospecting to account opening through maintenance and refresh, ongoing due diligence and client off-boarding. Fenergo CLM supports solutions for any client type, any product via a wide range of client journeys for all segments, channels and devices, offering clients a frictionless digital experience.



Fenergo Client Lifecycle Management Delivers as Standard



Add More Firepower to Fenergo CLM with Add-On Modules

Regulatory Compliance

AML/CTF. Tax (FATCA, CRS, US Tax). OTC Derivatives. ESG. Privacy. Investor Protection.

Fenergo's regulatory rules engine supports financial institutions with compliance obligations across 120+ jurisdictions spanning a wide range of regulations.

Risk Management

Enterprise-Wide Policy Management. Risk Models. Risk Assessment.

The policy rules engine works in tandem with Fenergo's powerful workflow engine to trigger the correct policy requirements at the correct point in time. Fenergo's Risk Engine enables the automation of on-demand financial crime risk assessment of clients and their related parties.

Discover the Power of Fenergo Client Lifecycle Management

Fenergo CLM delivers tangible benefits and return on investment for financial services firms seeking to digitally transform their client management and compliance operations.

- **Faster client onboarding**

Streamlined onboarding of low-to-medium risk clients, higher risk clients and accounts managed by exception.

- **Improved operational efficiencies**

Advanced API integrations, fewer touchpoints and re-usability of client information.

- **Regulatory & commercial safety**

Policy-driven accurate risk assessments aligned with in-scope AML, KYC and regulatory compliance regulations.

- **Reduced total cost of ownership**

Advanced API integrations connecting the end-to-end client journey.



fenergo

See how Fenergo CLM can transform your financial institution today

Request a demo



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