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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.

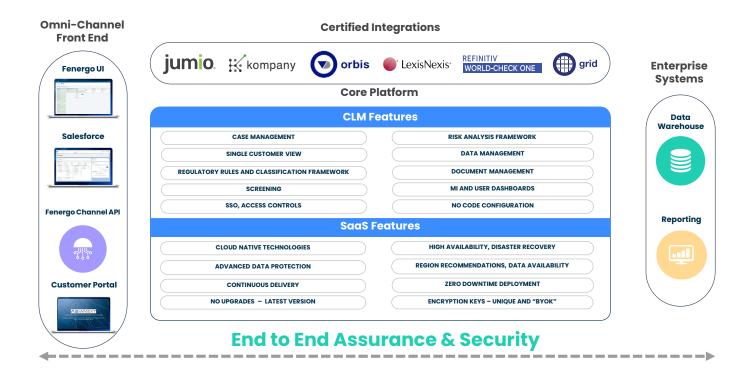
However, financial institutions must gather and validate detailed information about all clients to serve their needs, ensure regulatory compliance and stave off the threat of financial penalties for non-compliance. This creates significant operations inefficiencies and a client experience that is high-touch,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

Onboarding & Operations Management

Deliver fast, frictionless and compliant digital onboarding journeys for your clients.

Fenergo CLM digitally orchestrates client journeys through every point in the client lifecycle - from initial prospecting to digital account opening through maintenance and refresh, ongoing due diligence and client off-boarding.

Multi-channel by design and powered by API integrations, Fenergo creates a smooth orchestration process for all client data and documentation, minimizing time to revenue.

Advanced Client & Related Party Data Management

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Capture and re-use client information. A single client view for improved risk management.

Fenergo CLM provides advanced API integrations to leading data providers to digitally acquire client and related party data, without inconveniencing clients.

All client and party data and documentation is saved in a central repository for re-use across the enterprise. Clients can quickly add or update key information via a digital portal, which securely collects and processes new information. All information is saved, stored and used in accordance with local data privacy regulations.



Know Your Customer

Consistent KYC compliance across the organization.

Fenergo CLM supports the Know Your Customer (KYC) process by offering a set of enterprise-wide standards and requirements for KYC across 120+ jurisdictions to ensure that the correct data and documentation is aathered and maintained during the client lifecycle. Our best practice client journeys and rulesets deliver a risk-based approach to compliance during onboarding and support the identification of beneficial owners, the unwrapping of complex hierarchies, and recording of the nature and purpose of client relationships.



Digitalized Product Enablement Processes

Automatically capture, track and maintain clients' product lifecycles within a business arrangement.

Fenergo's Product Enablement domain provides a dynamic, automated solution that enables financial institutions to capture, clearly track and maintain a client's product lifecycle within a business arrangement. Fenergo's **Product Enablement** capability can drive better decisioning with greater clarity about what their clients do within the client/ financial institution relationship. It provides enhanced risk management and more accurate compliance and regulator reporting, improved process management and increased data quality.

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.

o 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.



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See how Fenergo CLM can transform your financial institution today

Request a demo

fenergo.com/clm

discover@fenergo.com

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