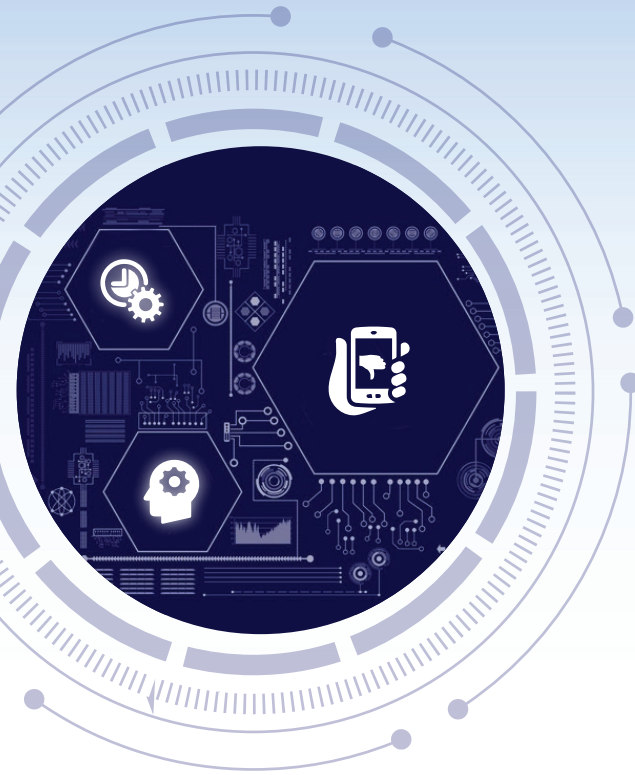


fenergo:



Fenergo Client Lifecycle Management

CLM for Onboarding Financial Services Clients



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 achieve both happy regulators and happy clients, financial institutions need a digital solution that streamlines client onboarding journeys and automates financial crime and regulatory compliance processes.

Fenergo Client Lifecycle Management

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

Fenergo Client Lifecycle Management delivers:

- ▶ Faster onboarding and maintenance of multiple accounts with fewer touchpoints, enhancing client experience
- ▶ Streamlined onboarding of low-to-medium-risk clients, enabling more focus on higher-risk clients
- ▶ Reduced costs to serve with efficient straight through processing
- ▶ Faster compliance and reduced risk with evolving regulatory requirements.



Fenergo CLM Delivers



Regulatory Assurance, Every Step of the Way

Fenergo's regulatory rules engine supports financial institutions with compliance obligations in multiple jurisdictions across a wide range of regulations: Anti-Money Laundering/Counter-Terrorist Financing (AML/CTF), Tax (US Tax, AEOI/CRS), OTC Derivative Reform and Investor Protection.

Fenergo identifies in-scope regulations and calculates the customer due diligence requirements to expedite onboarding. Our configurable workflows allow you to make quick changes to pre-configured rules and risk models with zero downtime to fit your firm's needs.



Client & Entity Data and Document Management

Fenergo CLM enables your clients to quickly add key information. It acts as a centralized repository of data and documentation, providing a single client view, improving risk management processes and reducing silos.



Journey and Orchestration Management

Fenergo CLM enables compliant onboarding of clients and products quickly, efficiently and safely.



Cloud Native Technology

The solution uses flexible cloud-native services, with best-in-class cloud technology delivering agility and data security.



Partnerships and Leading System Integrations

Our API-first platform comes with pre-configured journeys and integrations with ID&V, Customer Relationship Management (CRM) and data and screening providers to link the front and middle office.

Improve Client Onboarding Times by up to



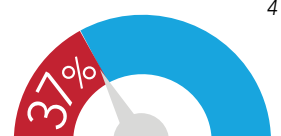
Reduce Onboarding Touchpoints by up to



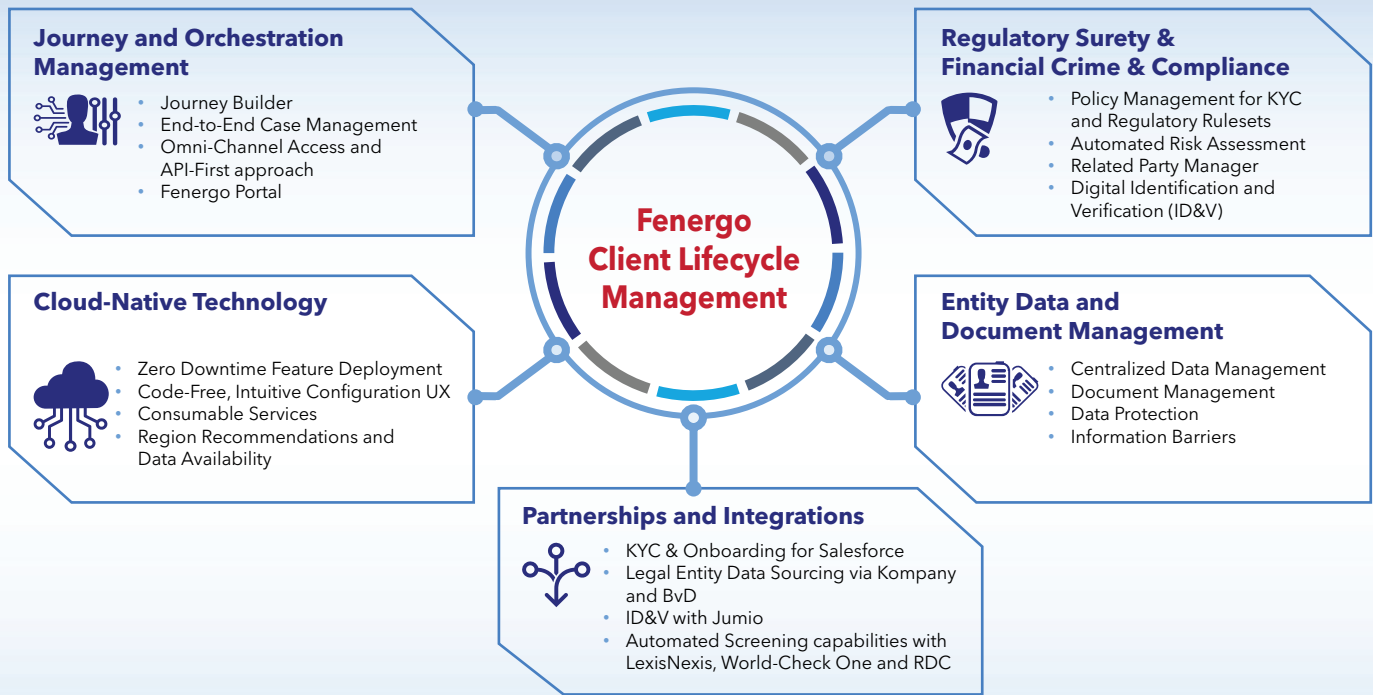
Reduce Application Abandonment by



Reduce KYC Review Times by



1) Forrester Research Report; (2,3) Fenergo CBR SOS Report 2019/2020; 4) Fenergo Client Case Study



Discover the Power of Fenergo CLM and Achieve:



Enhanced Client Experience through Faster Onboarding



Faster Compliance and Reduced Risk



Better Efficiencies and Reduced Total Cost of Ownership



Scalable, Secure Cloud Technology

fenergo:

Client Lifecycle Management

Reinvented customer journeys, streamlined compliance

Visit www.fenergo.com for more information.
Or email us for a demo: discover@fenergo.com