fenergo:·

salesforce



Fenergo Client Lifecycle Management for Salesforce®

Deliver a better client experience by digitally connecting every client journey

- ▸ Fast, efficient client onboarding
- ▸ A 360-degree client view
- ▸ KYC, AML & regulatory compliance-driven workflows in your CRM
- ▸ A digitally connected front to middle office experience
- ▸ Fast, scalable, configurable, API-First, SaaS solution

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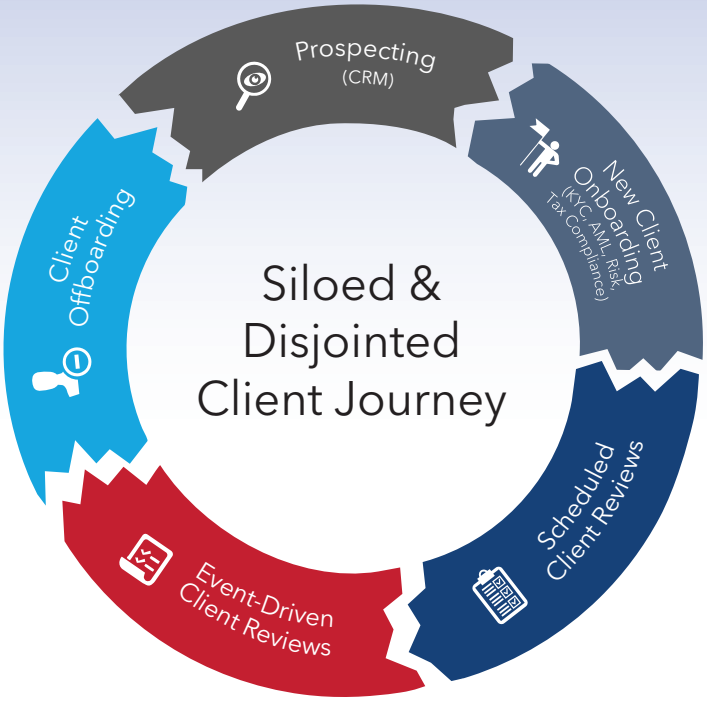
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The Client Onboarding Experience Challenge

Financial institutions are focused on delivering a best-in-class client experience.

Yet in many organizations, there is a sizeable disconnect across every client touchpoint during the onboarding and subsequent client lifecycle processes.

For every disconnect that exists in a client's journey, there is a corresponding reduction in client experience. Furthermore, every disconnect between internal stakeholders (relationship managers, client onboarding, KYC specialists etc.) also contributes to a poor employee experience.



Fenergo CLM for Salesforce

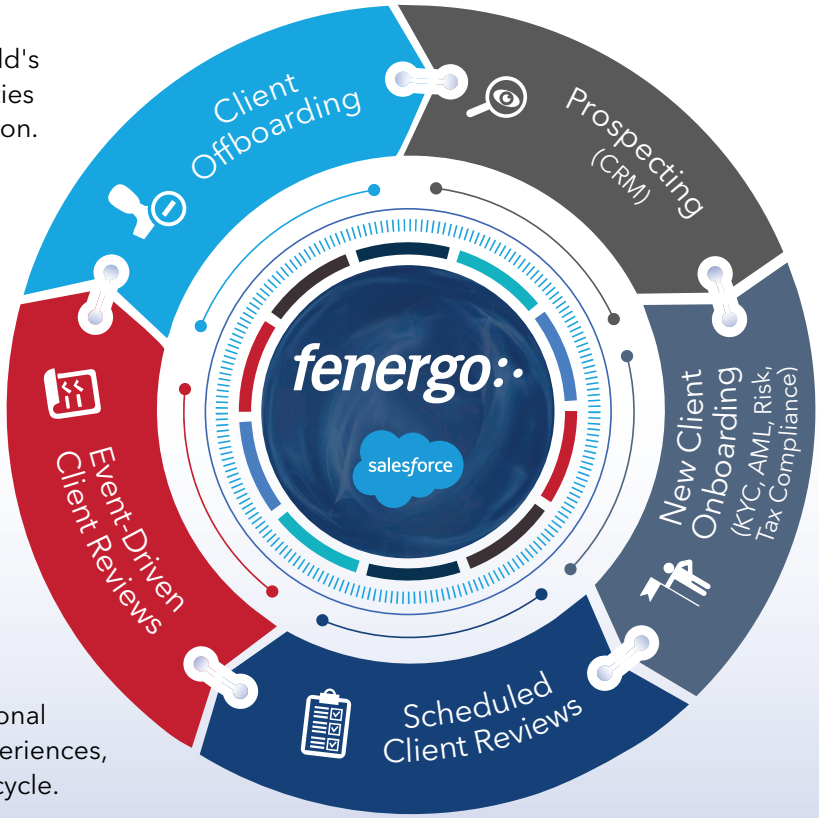
Fenergo CLM for Salesforce transforms the client onboarding and client lifecycle management process.

The solution combines the strengths of the world's No. 1 CRM solution with the advanced capabilities of the No. 1 Client Lifecycle Management solution.

It digitalizes the entire lifecycle process, becoming the steel thread that digitally connects every client journey in the client lifecycle process - from prospecting to client onboarding to ongoing KYC reviews.

It also digitally connects every internal stakeholder (relationship managers, client onboarding, KYC specialists) involved in the client onboarding process, enhancing visibility of the client process and tighter coordination between each party.

This joined-up approach empowers financial institutions to create significant internal operational efficiencies that help deliver superior client experiences, whilst ensuring compliance throughout the lifecycle.



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Fenergo CLM for Salesforce Delivers:

1. Fully Digital, End-to-End Onboarding Orchestration

Fenergo CLM for Salesforce delivers a truly frictionless and digital client journey from prospecting to onboarding and lifecycle processes. The solution puts Relationship Managers in the driving seat of a new banking relationship, empowering them to search for existing entities and initiate new client onboarding directly from their Salesforce screen.

2. KYC & Out-of-the-Box Regulatory Rules

Fenergo's regulatory rules engine delivers regulatory surety and compliance throughout the client lifecycle. Relationship Managers can capture basic client data and with just a few pieces of client information, Fenergo's regulatory rules engine can determine all the data and documentation that needs to be collected to support the KYC process.

Regulatory coverage spans 120+ jurisdictions and includes Anti-Money Laundering/Counter-Terrorist Financing (AML/CTF), Know Your Customer (KYC), Tax (US Tax, AEOI/CRS), OTC Derivative Reform and Investor Protection.

3. Entity Data & Document Management

Fenergo CLM for Salesforce enables financial institutions to digitally acquire, store and share client information, not only just between Salesforce and Fenergo, but also across multiple business lines and jurisdictions (data laws permitting). Fenergo integrates with a host of external data providers and internal data repositories, acting as a centralized repository of data and documentation, providing a single client view, improving risk management and reducing siloes.

4. Digital Client Outreach

For any outstanding documentation, the Relationship Manager can perform client outreach directly, easily and efficiently uploading client documentation. The solution delivers a best-in-class digital client outreach experience via the Fenergo client portal, digital ID&V and e-Signature capabilities. Beneficial owners and authorized signers can also be added to the client outreach process for seamless digital verification and expedited onboarding.

5. Risk Assessment

With a complete and accurate client profile, including relationship hierarchy information, financial institutions can accurately calculate a risk rating and expedite the KYC / CDD process.

6. Real-Time Visibility over Every Client Journey

Fenergo CLM for Salesforce digitally connects every stakeholder in the sales, client onboarding and KYC process. As the client onboarding journey progresses in Fenergo, the Relationship Manager has real-time visibility over the end-to-end process directly from their Salesforce screen and can receive automatic updates via chatter notifications.

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Software as a Service Solution

Available as a SaaS solution, Fenergo CLM for Salesforce delivers truly digital client and account journeys, including:

- **New Client Onboarding** including all KYC, AML, Risk, Tax, and operational processes
- **Scheduled Client Reviews**, ensuring regular and even real-time compliance with regulatory refresh obligations
- **Event-Driven Client Reviews** for perpetual compliance based on trigger events, including external data and screening alerts, as well as client-notified changes
- **Client Offboarding**, including advanced processes to offboard clients and/or product relationships.

Experience the Benefits of a Connected Front & Middle Office



Faster Omni-Channel Onboarding



KYC, AML & Regulatory Compliance



Frictionless Client Journeys & Enhanced Experience



Lower Total Cost of Ownership



Configuration & API-First, SaaS Solution



Faster Time to Revenue

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Take the next step on your journey to experience the full power of Fenergo CLM for Salesforce.

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