

A graphic showing a man in a suit giving a thumbs up, surrounded by various business icons like a bar chart, gears, a person, a clipboard, a handshake, a target, a 24-hour clock, and a checkmark, all connected by a network of lines. The word "ONBOARDING" is written in the center.

ONBOARDING

Financial Advisor's transition is a challenging and cumbersome process, it involves-Client's data privacy, data accuracy, new account openings, data transferring by complying to the FINRA regulations and more.

This process requires a huge amount of paperwork that needs to be processed, signed and submitted. Which may last for about 3-6 months, thus affects Advisors with the loss of revenue and business disruption.

Why not deliver an easier and less complex process to onboard your customers?

With Finity360 transition services you'll have a seamless advisor and client onboarding process which is less complex & aligned with FINRA regulations.

- **Finity 360 transition service is a leading forms automation and workflow solution that can help you manage a huge amount of workload that comes with the Adviser's transitioning.**
- **It helps in saving time, money & efforts for RIAs, Broker- Dealers and advisors with its secured cloud-based solution.**
- **We create a pleasant experience for the Advisor's and Client's transitioning according to the firm's specific instructions.**
- **Prefilling of forms based on the standard protocols.**

Key Benefits

- ▶ **Makes a better customer onboarding experience.**
- ▶ **Cloud based solution for advisor's transition process saves a lot of time and paperwork.**
- ▶ **Secured and Compliant cloud-based document storage.**

About Finity360

Finity360, an innovation of Arcus Inc., is a suite of cloud-based document and data management solutions that gives financial institutions the agility, scale and security they need to gain maximum business value from their traditional documents, digital assets, and operational workflows.

Based on more than 30 years of experience in capital markets, securities back-office operations, data aggregation and system integration, Finity360 helps capital markets and other financial services organizations modernize their operations and revenue models by eliminating technology, process, data and regulatory challenges.

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