incedo

Streamlined Client Onboarding for US-based Top Financial Advisor

Key Challenges

- Manual, time-consuming onboarding process for advisors and clients
- Frequent errors like NIGOs* caused delays and frustration
- Difficulty supporting diverse account types across multiple entities

*Not In Good Order

Business Solution

- Automated Workflow: Streamlined process reduces onboarding time by 90%
- Straight-Through Processing (STP): Eliminates NIGOs*, slashing error rates from 40% to 5%
- API-Driven Integration: Supports 70+ account types for seamless handling

Business Impact

90%
time slashed on onboarding

40% to 5%
NIGO rates brought down, boosting accuracy

Automated processes created a smooth client experience

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