

Digital Client Onboarding in Wealth Management: Elevate First Impressions for Competitive Excellence



Your initial customer interaction is not just a process—it's a chance to set the tone for a lasting relationship. In wealth management, a memorable and seamless first encounter builds trust and positions your firm as innovative and client-centric. Wealth management firms that digitalize and automate client onboarding by leveraging the latest technologies like Gen AI can transform routine procedures into engaging experiences, delivering speed, security, and personalization, while reducing costs.

Hexaware Empowers Wealth Management

At Hexaware, we transform your client onboarding process into a seamless, efficient, and engaging digital journey. We deliver tailor-made solutions focused on digital transformation, cloud modernization, and AI-powered data analytics by integrating our technological expertise with deep domain knowledge.

Hexaware's Tailored Digital Client Onboarding Capabilities

Streamlined Processes and Automation

- Automate key onboarding steps—from client data collection and product selection to reporting.
- Incorporate e-KYC and automated compliance checks to streamline regulatory compliance.

Enhanced Client Experience

- Deliver a superior digital experience through user-friendly portals that offer real-time portfolio insights.
- Leverage advanced analytics and interactive dashboards to provide personalized onboarding journeys and actionable insights.

Effective Data Management & Integration

- Utilize low-code/no-code platforms to efficiently aggregate, normalize, and validate client data.
- Integrate external data sources—market providers, research platforms, and live feeds—to empower timely and informed decision-making.

Regulatory Alignment and Reporting

- Ensure full regulatory compliance with standardized reporting processes.
- Harmonize data across multiple channels and generate automated transaction reports.

AI-led Solutions

- Enhance client support with AI-powered virtual assistants.
- Tailor investment strategies based on client goals and preferences.
- Automatically extract and summarize document information to support faster client interactions.

Seamless Systems Integration

- Evaluate, customize, and implement third-party platforms and products with comprehensive support—from performance testing and security assessments to continuous 24x7 monitoring.
- Enable multi-channel engagement by integrating client portals, mobile applications, and CRM systems.

Key Benefits

80%+	90%+	90%+	40%+	70%+
reduction in manual data processing time	data extraction accuracy	reduction in errors due to manual data entry	reduction in total operational costs	overall reduction in onboarding time

Digital Client Onboarding in Wealth Management: Accelerators

Digital Dashboards

- Offers real-time visibility into onboarding activities with customizable performance metrics and KPIs.

GenAI-powered Intelligent Document Processing Solution

- Automates document processing with advanced AI, reducing manual effort while ensuring accurate data extraction—even from handwritten and multilingual texts.
- Enhances data security and privacy.

GenAI-powered Intelligent Digital SME

- Leverages a GenAI model trained on wealth management workflows to provide precise, contextual responses to queries on client onboarding and wealth management.
- Continuously learns from user interactions to deliver timely, actionable guidance, streamlining decision-making and enhancing the onboarding process.

Why Choose Hexaware?

Open Architecture & Modular Framework • Ensures flexible, disruption-free module updates.	Digitized Document Management • Swiftly converts raw data into structured insights.	AI-powered Domain Expert • Delivers real-time, personalized guidance for compliant onboarding.
Digital Dashboards • Offers centralized, real-time visibility for seamless onboarding.	Robust Product Partner Ecosystem • Access industry-leading platforms/solutions through a trusted partner network.	Scalable Data Models for Analytics • Prebuilt, adaptable data models simplify data ingestion and validation.

Visit hexaware.com/industries/financial-services/ to learn more about transforming your digital client onboarding process today, or reach out to us at marketing@hexaware.com.

About Hexaware

Hexaware is a global technology and business process services company. Every day, Hexawarians wake up with a singular purpose: to create smiles through great people and technology. With this purpose gaining momentum, we are well on our way to realizing our vision of being the most loved digital transformation partner in the world. We also seek to protect the planet and build a better tomorrow for our customers, employees, partners, investors, and the communities in which we operate.

With offices across the world, we empower enterprises to realize digital transformation at scale and speed by partnering with them to build, transform, run, and optimize their technology and business processes.