Finity360™ FORMS

DIGITAL ONBOARDING

PRODUCT OVERVIEW

DIGITAL ONBOARDING, WITHOUT THE PAPERWORK MAZE.

Guide clients and advisors through data collection, validation, attachments, document preparation and eSignature in one configurable workflow.

BUILT FOR FINANCIAL SERVICES

- New account opening
- Client onboarding
- Household and joint workflows

Finity360 Forms replaces disconnected paperwork and repetitive data entry with guided digital journeys. Natural-language and web-based forms make information collection easier for clients, while business rules, document bundling, integrations and workflow visibility help operations teams reduce avoidable NIGO (Not in Good Order) issues.

ONE CONNECTED PROCESS

01

Capture once

Reduce repetitive data entry across forms and account workflows.

02

Validate early

Apply configurable rules before documents move downstream.

03

Sign digitally

Bundle documents and route them for electronic signature.

04

Track end-to-end

Monitor status, alerts and completion from one process.

Designed around the household

- Support individual, joint and household onboarding scenarios.
- Share and reuse information across parties when required.
- Support registration types and supplemental document requirements.

Configured for your business

- Create workflow-specific rules, validations and attachments.
- Bundle forms and documents into a guided journey.
- Connect Salesforce, custodians, recordkeeping and internal systems.

From intake to signature, the process stays connected, guided and visible.

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BUILT FOR MODERN WEALTH MANAGEMENT ONBOARDING

One connected onboarding journey

A configurable digital experience connects client data, forms, signatures, workflow and downstream systems - helping clients complete the journey and helping operations teams keep control.

PRODUCT CAPABILITIES

Guided digital forms

Natural-language and web forms create a more approachable experience than paper packets.

Document bundling and attachments

Assemble required forms and supplemental documents in one process and capture supporting files.

Workflow visibility

Track and report on application status with notifications and alerts that keep teams informed.

Salesforce and system integration

Connect Salesforce, custodians, recordkeeping platforms and internal systems.

Business rules and validation

Apply firm-specific rules to account details, required information and supporting artifacts.

eSignature integration

Route completed packages for eSignature, with documented support for DocuSign and SIGNiX.

Address hygiene

Use USPS CASS-certified address hygiene and correction services to improve address quality.

Document retention

Preserve completed documents in Finity360 Docs or connect an existing retention solution.

DEPLOYMENT AND OPERATING FIT

Flexible deployment

Use the Finity360 Salesforce portal or integrate the experience into your web portal.

Financial-services ready

Support clients, advisors, operations, compliance reviews and downstream systems.

Configurable by design

Adapt as business rules, products, documents and supervisory procedures change.

TURN ONBOARDING INTO A BETTER FIRST IMPRESSION.

Product capabilities and integrations shown reflect the supplied brochure. Availability may vary by implementation and configured integration.

SCHEDULE A DEMO

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