






# The end-to-end investor onboarding process with Thomson Reuters fund formation capabilities

Turn manual efforts and delayed processes into automated workflows and stronger client relationships

## HOW IT'S POSSIBLE:

- 1 Onboard** Intake forms with logical instructions to collect all information for all investors managed per fund, including KYC
- 2 Review** Create workload boards and dashboards for full insight of all incoming requests and automation rules
- 3 Draft** Draft & Create documents based on the investor profile information collected  
  
Workflows to automate document production
- 4 Close** Collect and create all documents and store them in a single place
- 5 Sign** Create workflows to automate the signing process

## OUTCOMES ACHIEVED:

-  Greater efficiency in managing the investor onboarding process
-  Automation of the onboarding, drafting and signing process
-  Save time on the complex investor onboarding process
-  Reduce risks when capturing investor information required for regulatory compliance
-  Superior client experiences  
By using an end-to-end investor onboarding solution, legal teams are able to streamline the complex fund formation process from opportunity to close, while maintaining regulatory compliance. By simplifying the process for investors, legal teams will deliver a superior experience for their clients that they will be sure to remember.

Simplify the investor onboarding process with next-generation technology