

## Private Capital Institutional Onboarding

### Slow, manual, increasing complexity and hard to scale

The LP/investor onboarding process is growing in complexity due to the rising number of investors drawn from different pools, who are increasingly expecting 'special treatment' (*consider side letters*).

Connected to Fund Setup (*consider SMA or fund-of-one*) and Deal Execution (*consider mandate compliance*), the investor onboarding process often lacks the capture of structured data and must contend with the ever evolving regulatory/compliance landscape (*consider periodic KYC checks*).

The result: delayed onboarding slows down AUM-growth and associated fees and negatively impacts the LP/investor experience. The long and complex process is costly, which drives up external costs (*e.g., legal*) and increases internal headcount.

Operationally, your current solution is inhibiting scale.

### The Solution: Intelligently glue your processes together

Our Institutional Onboarding solution has been designed based on a belief that return on technology comes from intelligently 'gluing' together your existing systems & processes.

Built from the ground up, it enables rapid configuration to fit with your processes and integrate with your existing systems, including 3rd party providers such as legal or fund administrator services. It gives you a 360-view of the process pulled together into one solution: Providing senior leaders with dashboards and the team with smart workflow and task tracking across multiple functions, geographies and time zones.

Typically, we can automate 90% of the processes from start to finish, including:

- Workflow & Data Automation
- Document Automation
- KYC/AML & Risk Assessment
- Dashboards & Reporting
- Self-Service Client Portal



### Efficiency and improvement

Automate client data capture - integrate seamlessly with CRM and other applications



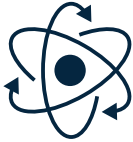
### Faster, better decisions

Manage document approval - centralise and improve key document sign off process



### Scalable

Customise to your process - connecting systems with Intelligent Glue



### Dynamic

KYC/AML risk scoring throughout the onboarding process



### Automate & digitalize

Subscription document management / side letter management & data capture



### Balance risk and reward

Comprehensive analytics and improved insights

## psKINETIC – at a glance

- We **implement** and **scale** intelligent automation solutions for ambitious **Private Capital, Asset and Wealth Managers**.
- We combine **industry expertise, leading automation tech** and a **proven delivery machine**.
- Driving scale, maximising returns and minimising risk by leveraging **our industry & automation technology expertise**.
- Focused on **intelligently gluing together** existing systems and processes.
- Built on trusted, highly secure, scalable technologies – we build an **agile delivery machine** - deploying into production in 90 days.



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# psKINETIC

**psKINETIC** is a leading provider of Intelligent Automation Solutions for Financial Services. Our focus is on delivering outcomes and financial return for clients at pace. We don't believe in 'just rip out and replace' – it is too risky and too costly – with our Intelligent Glue we help clients connect and enhance existing systems and processes. Our experienced professionals master a range of automation technologies and we support customers through the full cycle of Design, Build, Run & Optimise.

For more information, visit [www.pskinetic.com](http://www.pskinetic.com)