IFS TRANSITIONS

Help new advisors to simplify the onboarding of their book of business.

To attract and retain top advisors, you need a digital onboarding experience that is transparent, simple, and that shows your dedication to a great relationship. IFS Transitions creates an initial experience with your firm that imports accounts quickly and correctly. Separate dashboard capabilities can create a new, higher level of transparency, in addition to monitoring day-to-day activities. With bulk import, a new advisor's entire book of business can be safely transferred, helping you lose the faxing, mail couriers, and sticky notes—and building client loyalty.

FEATURES:

- Focus on the post-affiliation process.
- Configurable Transition templates.
- Easy-to-use spreadsheet upload format.
- Review uploaded records in "staging" area before they are created within IFS Onboarding.
- Leverage the power of IFS Onboarding.
- Ability to involve your customer in the data collection process.
- Transition Dashboard and Reporting capabilities for Advisors, Assistants, Offices/Branches, and the Home Office.

BENEFITS:

- Make a lasting first impression with new advisors and offices.
- Improve your ability to attract top advisors and offices with a digital transition process.
- Do not just bring on accounts... bring on clients as a household and provide a consolidated document package for the entire group.
- Establish a consistent Onboarding experience that will be used for Transition accounts and other ongoing business.
- Correct data before it is too costly to change it.
- Carve out your book of business the way you want to, and upload as many spreadsheets as needed to facilitate the transition.
- Configurable templates allows the home office to establish core processing parameters and defaults to streamline the overall data collection and enforce available products and services.
- Build client satisfaction and loyalty by providing an intuitive digital experience.
- Improve transparency within the user experience, making it easier to service the client and the advisor while reducing frustrations.