



JIFFY.ai for Wealth Management

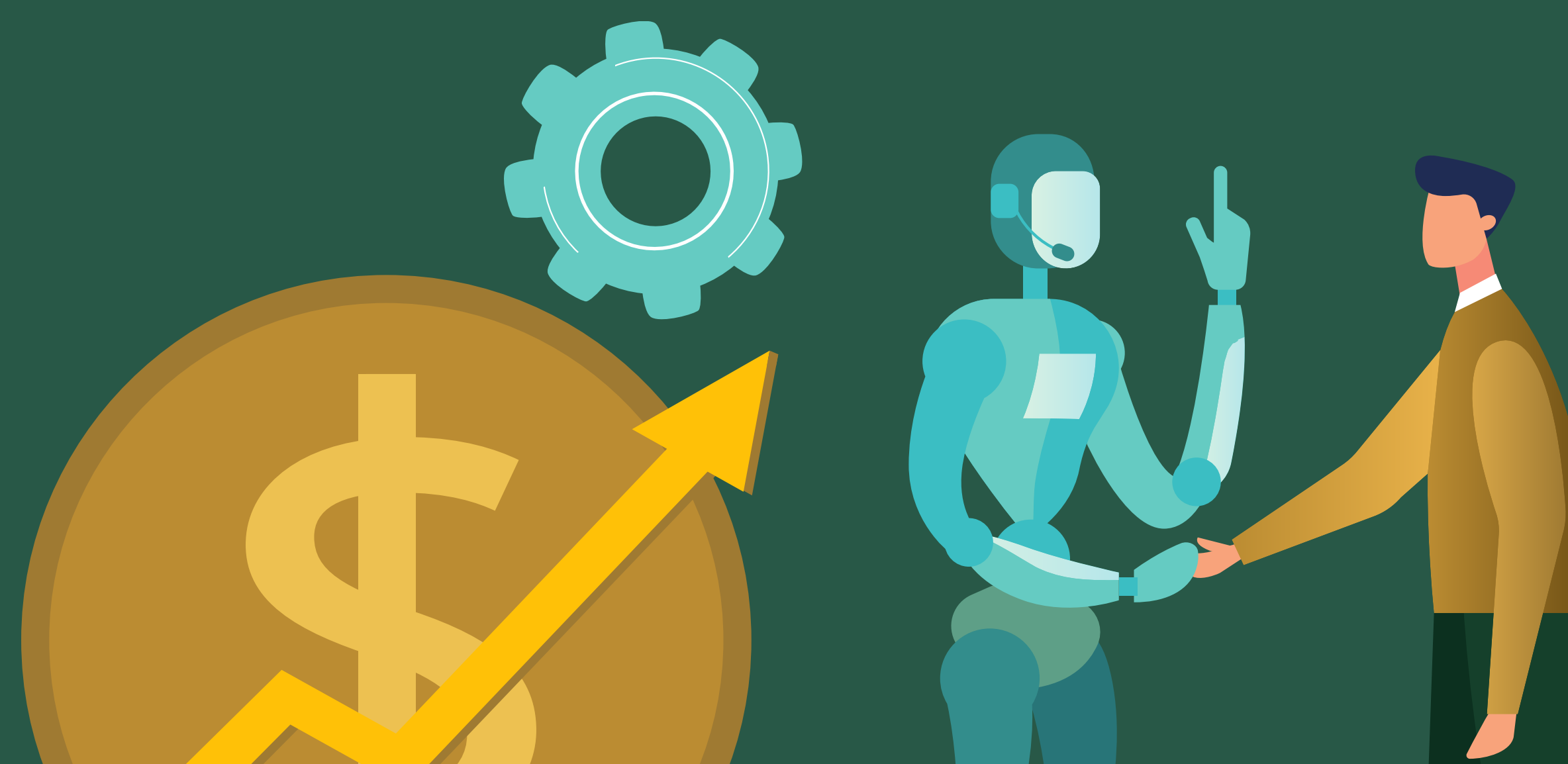
An overview

Problem

Wealth Management practitioners must constantly look for ways to enhance their offerings, provide personalized services at scale, and make data-driven decisions. However, legacy approaches to essential processes like onboarding new advisors and investors and the ongoing servicing of accounts are tedious, manual processes that can be error-prone and lack transparency across all of the value chain constituents.

Solution

JIFFY.ai's AI-powered enterprise platform and no-code HyperApps purpose-built for the Wealth Management industry, provide an integrated, autonomous experience, simplifying operational processes and workflows end-to-end – from onboarding advisors and investors to account servicing. We enable Wealth Management professionals and organizations to adopt AI-based automation technologies faster, boost efficiency, save time and money, capture revenues faster, and exceed investor expectations, resulting in exceptional experiences across the entire value chain.



THE **PROMISE** OF AI

AI in general and Generative AI in particular represent the single biggest transformation in enterprise computing since the advent of the internet.

- Harvard Business Review estimates that **AI will add \$13 trillion** to the global economy over the next decade.
- Nearly half of respondents say **AI will help them boost revenue by 10% or more.**
- 46% of respondents say **AI has enhanced business operations and improved customer experience.**



Investor Onboarding

Transform Onboarding End-to-End with AI

The process of onboarding new Wealth Management advisors and investors is fraught with tedious, manual tasks, due to siloed internal systems and disjointed workflows. JIFFY.ai fast-tracks the entire onboarding process, so your advisors can deliver value to investors earlier, and get them up and running in a jiffy.

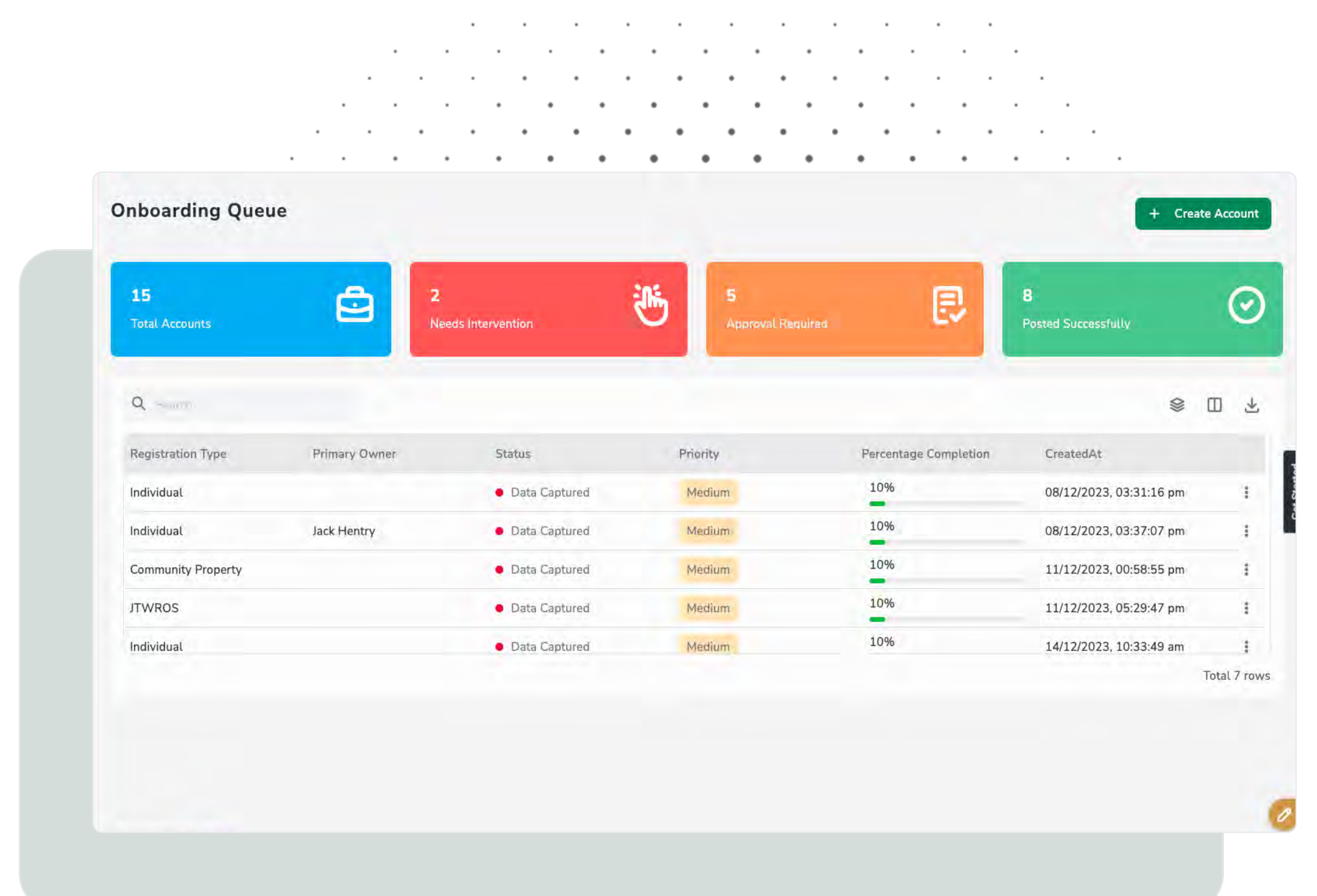
A Fidelity survey revealed that **23% of new account applications** experienced NIGOs.

52% of global wealth managers are concerned about losing clients due to dropouts during their poor onboarding experience.



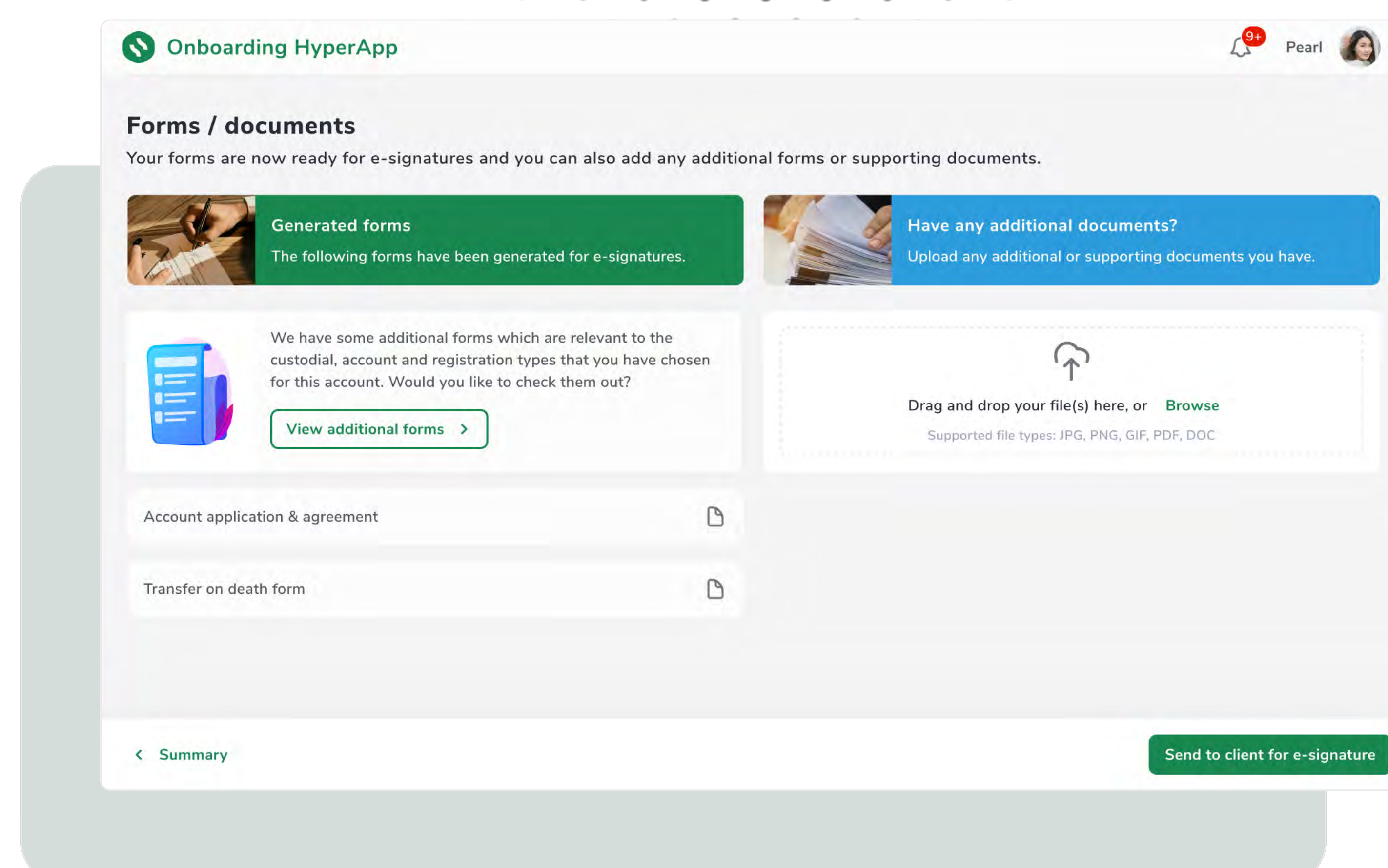
Data Capture

Expedite the onboarding journey while ensuring a higher degree of accuracy in capturing essential details such as investor identities, financial documents, and compliance information with AI. Reduce the reliance on manual data entry and streamline the entire data capture process. Enhance efficiency, minimize errors, and deliver a seamless onboarding experience for investors and advisors alike.



Document Extraction

Automate the extraction of information from various documents such as passports, driving licenses, address proofs, income proofs and others, and route them for processing to downstream systems such as CRM (SalesForce and Wealthbox), Custodians and Clearing Firms (BNY Mellon / Pershing, Fidelity, Schwab, Apex Clearing), and TAMPs (Envestnet and AssetMark) automatically, using AI. Minimize errors associated with manual data entry, ensuring a more accurate and compliant process.



50% Improvement in experience over traditional onboarding solutions

40% Reduction in the total cost of ownership by eliminating multiple siloed onboarding systems

30% Reduction in cost of onboarding an account due to deep AI-based integrations that avoid manual data entry

Know Your Investor

Verify investor identities and credentials faster and more securely, using AI. By automating the analysis of vast datasets and cross-referencing information from various sources such as SalesForce, Wealthbox, Money Guide Pro, eMoney, and many more, JIFFY.ai significantly reduces the time and effort required for identity verification.

Streamline Asset Transfers

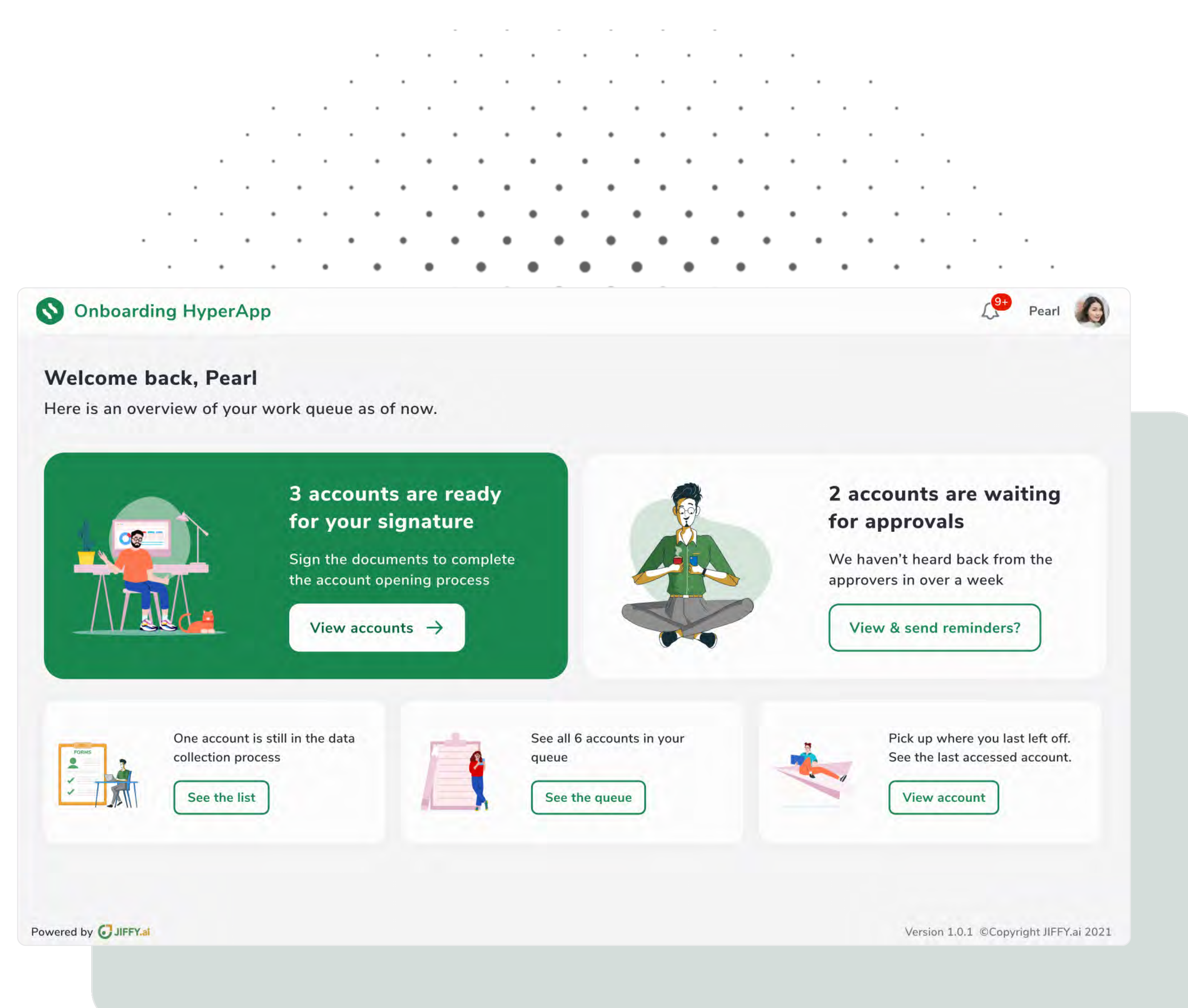
Provide a fast, end to end, hassle-free onboarding experience by including the account transfer process at the time of account opening. Ensure a seamless transition for investors, eliminating potential delays and enhancing overall satisfaction with the onboarding experience. JIFFY.ai enables Advisors to extract insights from a wide range of pre-integrated third-party systems and automates decision-making without writing a single line of code.



JIFFY.ai enables up to 5X improvement in turnaround time for onboarding, with an 80% increase in capacity created.

Integrate End to End

Connect your onboarding system with external platforms and downstream processes such as front-end systems (i.e. CRM), custodians, clearing firms, TAMPs, and all of the platform providers in your ecosystem for quick and effortless onboarding. Enhance data consistency, providing a unified and efficient onboarding experience for advisors and investors. No swivel chair! No more repetitive processing!



Save Time and Money

Complete onboarding paperwork quickly and easily with intelligent AI and Machine Learning models. Reduce operational costs associated with manual, time-consuming processes, enabling your firm to allocate resources more efficiently.



Advisor Transition

Automate Transitions and Accelerate Time-to-Revenue with AI

Bringing advisors and their investors into your organization involves endless manual, paper-based processes, leading to "not in good order" (NIGO) documents, a suboptimal impression, and delays. JIFFY.ai's Advisor Transition HyperApp automates an advisor's transition end-to-end, improves efficiency, and helps your firm to start capturing revenue sooner.

Frictionless Advisor and Investor Data Capture

Gather advisor and investor information from various sources such as emails, physical forms (i.e. statements) and ID cards faster, accurately and securely with AI, and move it from the existing firm to your firm effortlessly. Save significant cost and speed up the transition process. JIFFY.ai's intelligent document processing capability retrieves data from structured, semi-structured and unstructured documents of various types – images, scanned documents, pdf, word docs, and more.



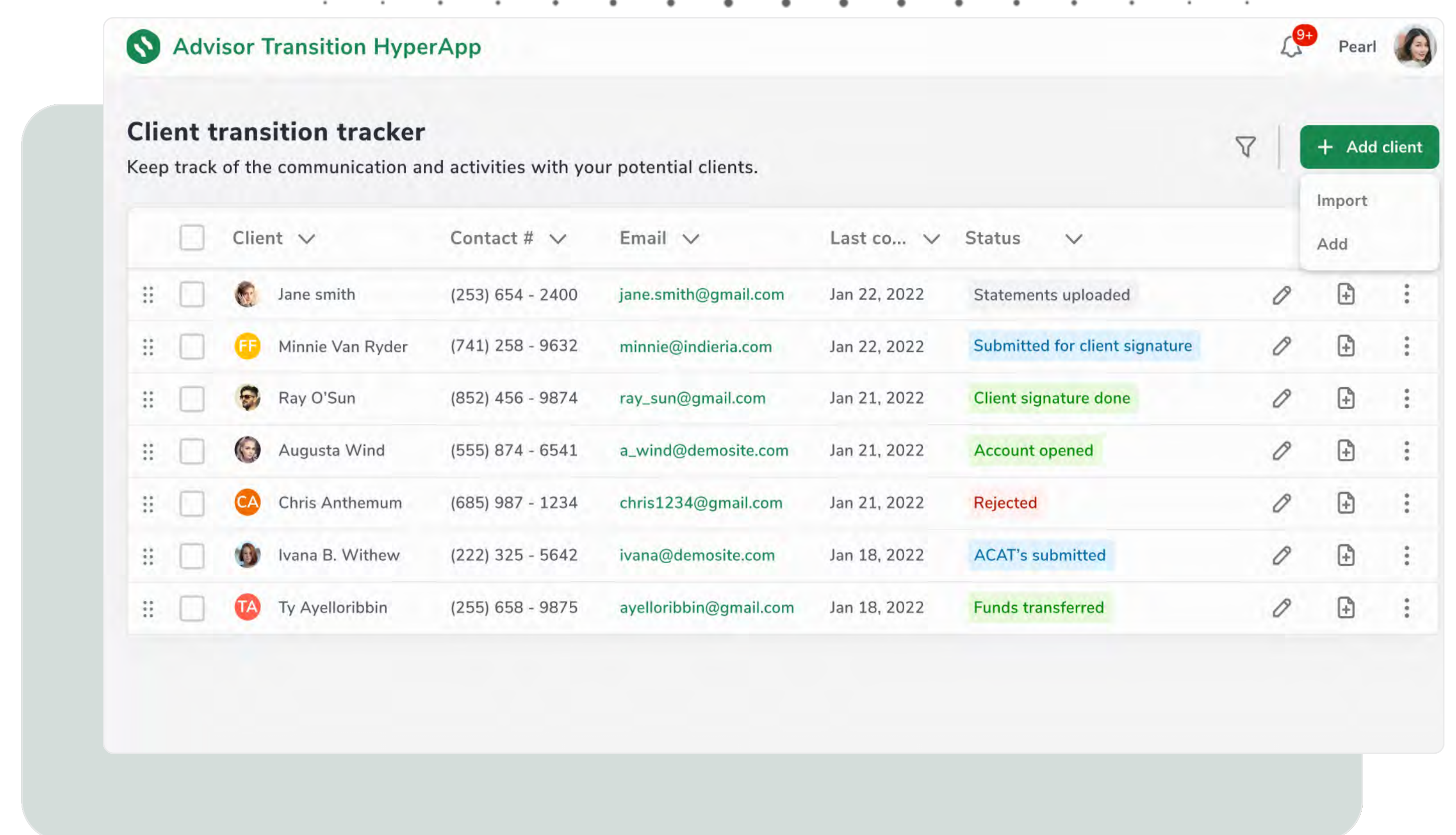
On an average, even 60 days after the start of an Advisor's transition, the transfer of the Investor accounts is only 60% successful. **Such delays and errors can erode the Advisor's revenues by 32%** during the transition timeframe.

Deliver Delightful Experiences

Create a great first impression, deliver highly personalized experiences, and minimize friction for advisors, employees and investors with our real-time, actionable dashboard.

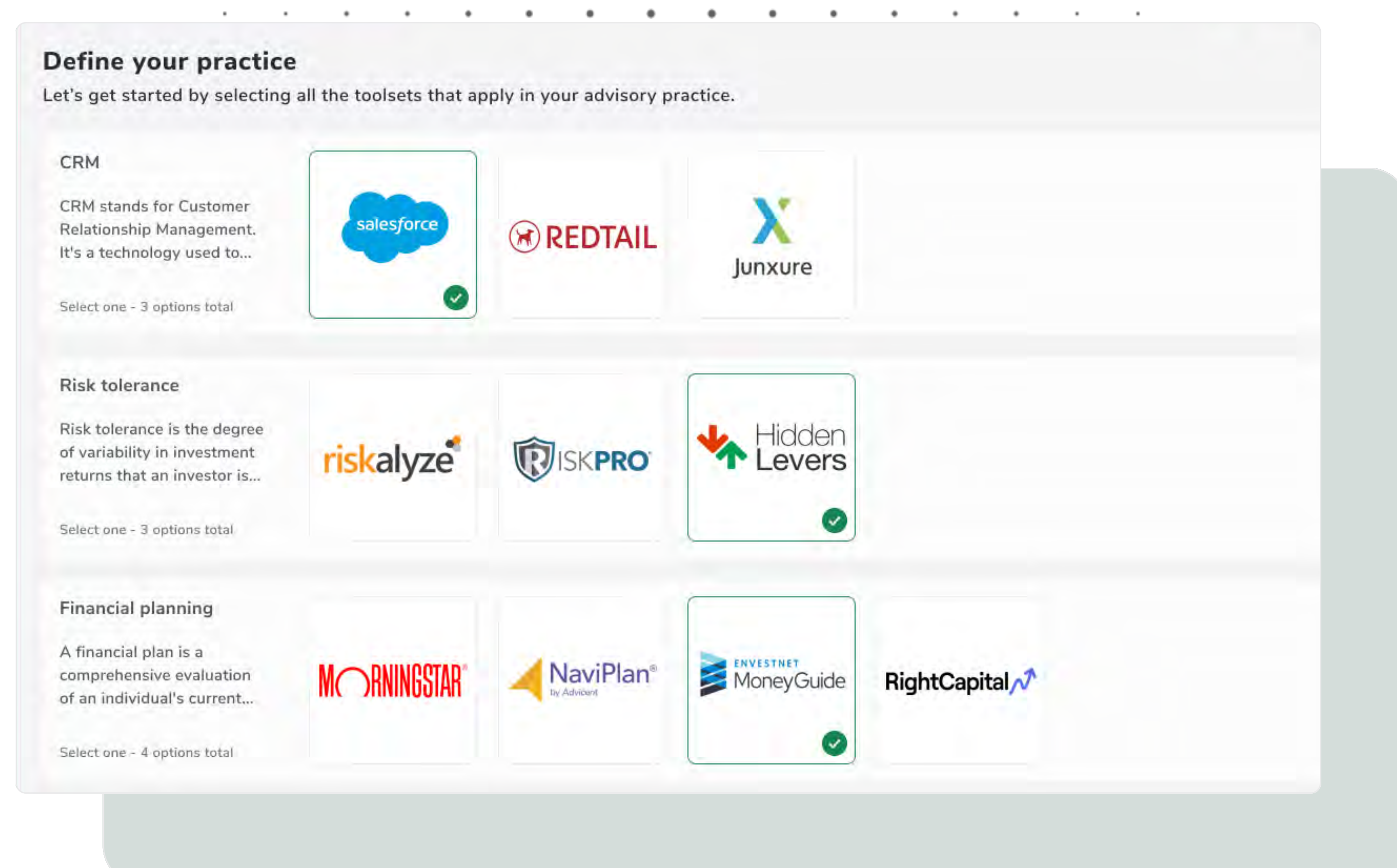
Track Progress from Day One

Understand investor progress and advisor performance with our built-in, automated, custom dashboards that enable milestone-based reporting. Ensure transparency and foster a dynamic and responsive onboarding process by monitoring progress from the outset.



AI has the potential to transform businesses across industries by improving efficiency, decision-making, customer engagement, and innovation. It is increasingly becoming a competitive advantage for organizations that embrace and harness its capabilities effectively.

Goldman Sachs forecast AI investment to approach \$200 billion globally by 2025.



Months to Minutes

Save months from the transition process with seamlessly automated integrations with a wide range of third-party wealth management applications that ensure smooth and error-free transitions in a jiffy. JIFFY.ai improves interoperability, streamlines data updates, and eliminates manual effort by integrating with disparate applications and systems via APIs or UI-level interactions.



Account Services

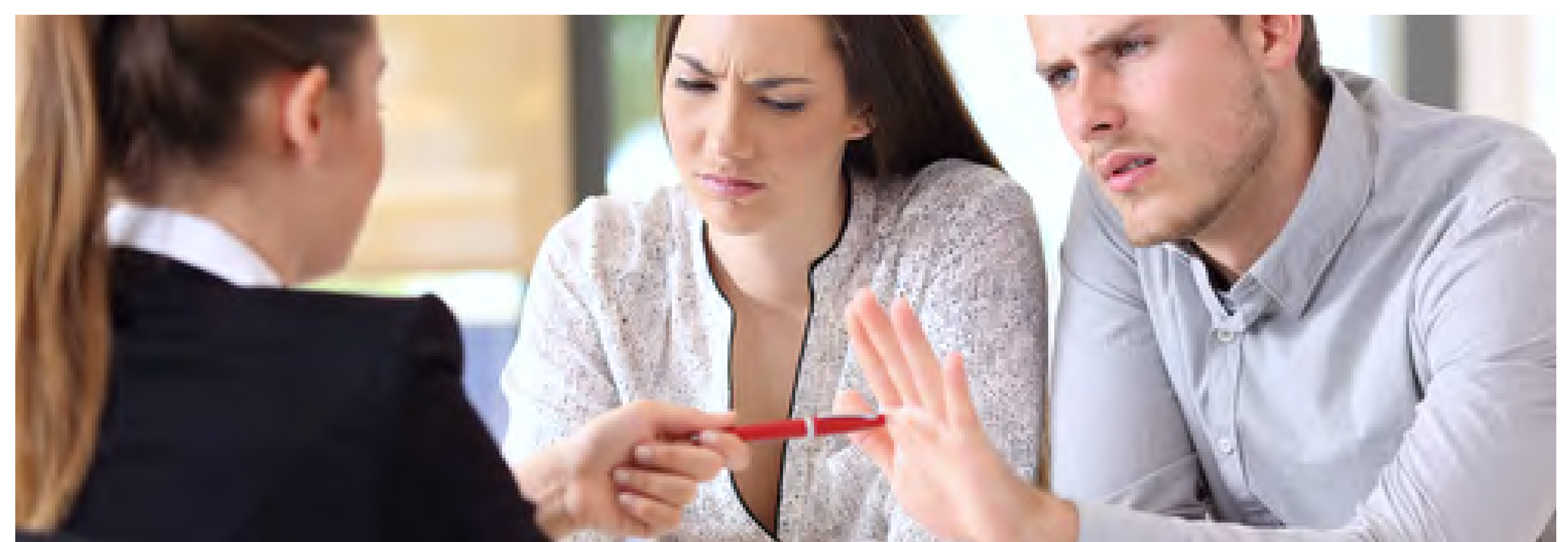
Delight Investors with Every Transaction Using AI

Investors communicate with you in different ways—chat, online, text, phone, or in person—and expect a seamless, delightful experience. JIFFY.ai automates account servicing requests from start to finish—whether initiated by clients, advisors or the Home Office—while reducing administrative and support costs that eat away at margins.



Accelerate Servicing

Ensure servicing needs such as address changes, beneficiary changes, harvest losses, rebalance requests and others are executed quickly and efficiently. Enhance investor satisfaction while enabling advisors to focus more on strategic financial planning.

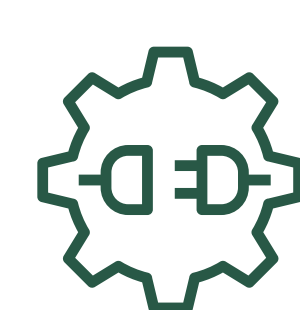


A Zendesk study revealed that **72% of customers want immediate resolution** for their challenges.



Streamline Money Movement

Make money movement faster and more secure while creating a delightful experience using JIFFY.ai's intuitive UI, and automate transfer workflows for frictionless transactions with AI. Enhance the overall security and reliability of financial transactions for investors.

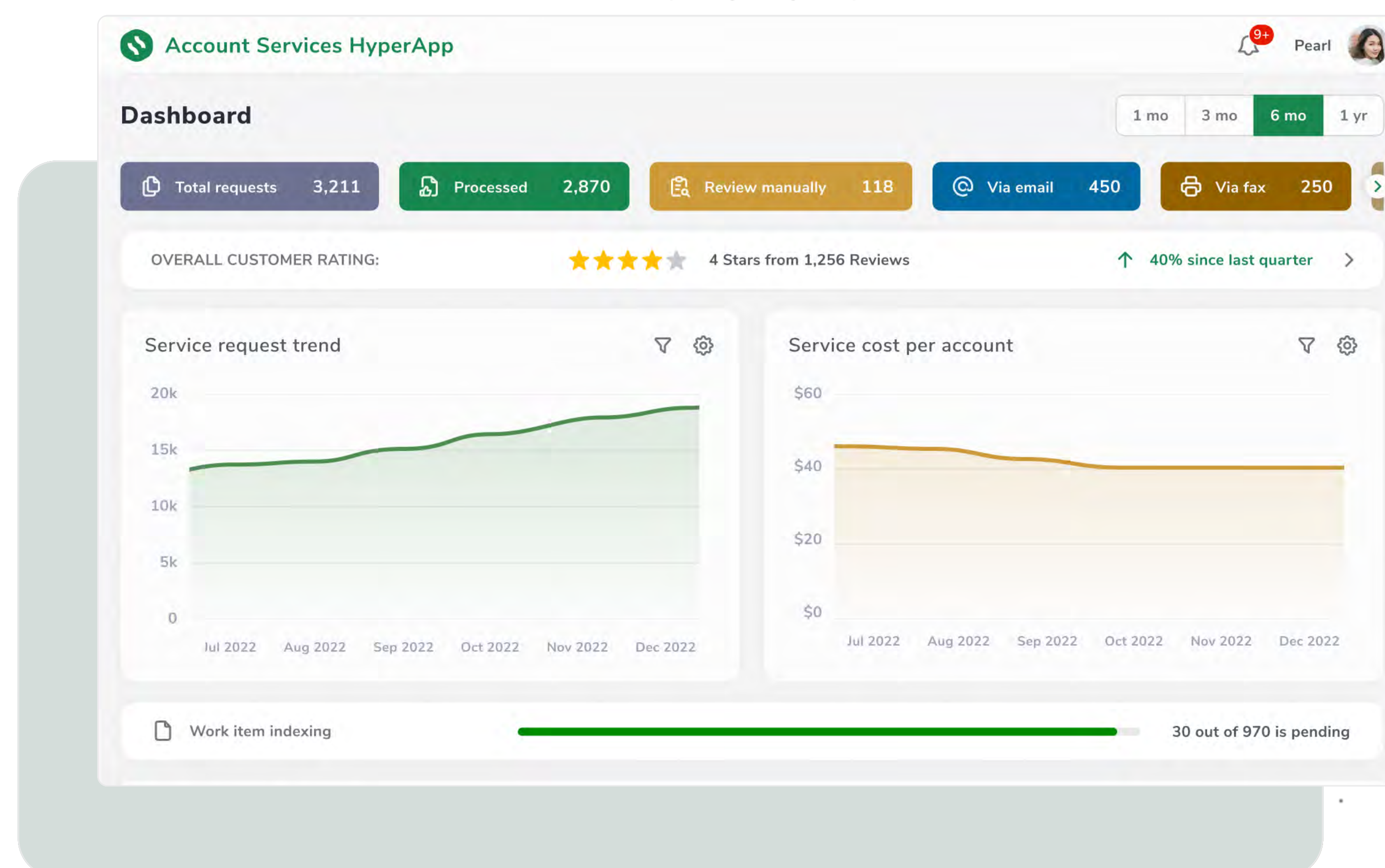


Smart Integration for Faster Data Flow

JIFFY.ai comes pre-integrated with external platforms and downstream processes, so you can eliminate silos, reduce redundancies, and ensure real-time data exchange between systems. Whether it is interfacing with financial institutions, regulatory databases, or market analytics tools, JIFFY.ai facilitates a cohesive Wealth Management ecosystem, allowing for a swift and accurate information flow.

Boost Home Office Efficiency

Use AI to automate account pre-screening, work item classification, trade reviews, and transfers for faster servicing and higher accuracy. JIFFY.ai passively offers real-time insights to the Advisor during client conversations, suggesting next-best actions and delivering data to help illustrate the Advisor's point.



30-50%

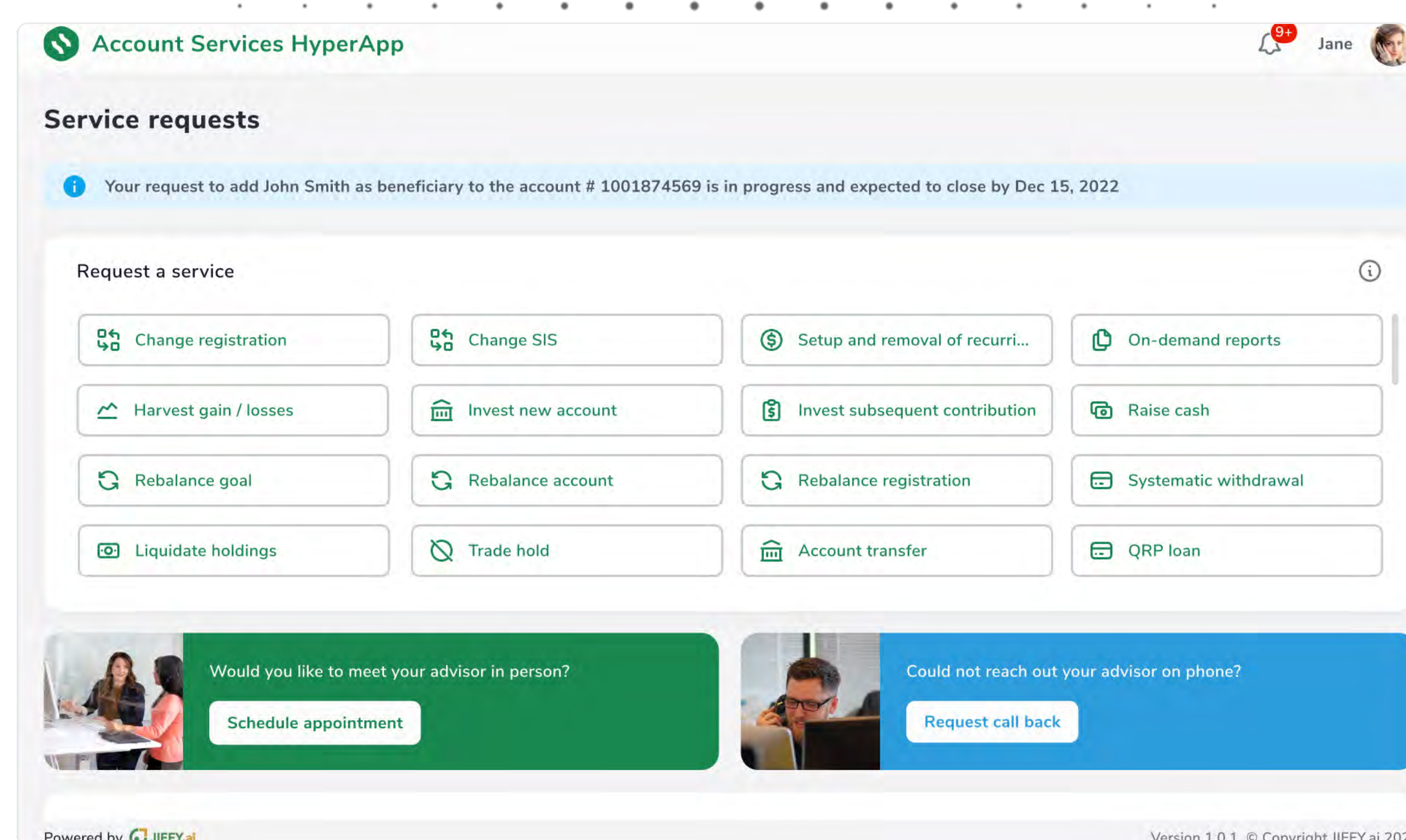
Reduction in complexity by eliminating multiple redundant systems

40%

Reduction in cost of servicing the accounts due to AI based automation of the handling of service requests

20%

Next Best Action - Every servicing touch point is an opportunity to cross / up sell



Enhance Efficiency and Cost-Effectiveness

Eliminate manual paper-based tasks, freeing up advisors to build stronger client relationships. Empower advisors to redirect their focus towards personalized client interactions, fostering stronger and more meaningful relationships.

Generate your app with JIFFY.ai Companion™

Provide a name to your app

e.g. Invoice processing

Summarize your app in a few words, and the Companion will assist you

e.g. I need an app that streamlines and automates invoice processing

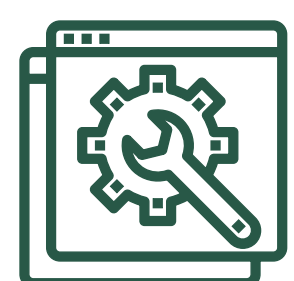
The JIFFY.ai AI-powered No-code Enterprise Platform

JIFFY.ai's autonomous enterprise platform and Wealth Management HyperApps help you to digitally transform your business. They enable you to deliver delightful digital experiences and take advantage of no-code intelligent automation to drive operational efficiency and increase revenue, while ensuring effective risk and compliance oversight.



UI Builder

Assemble widgets and forms rapidly to build rich, modern experiences for investors, advisors, or employees.



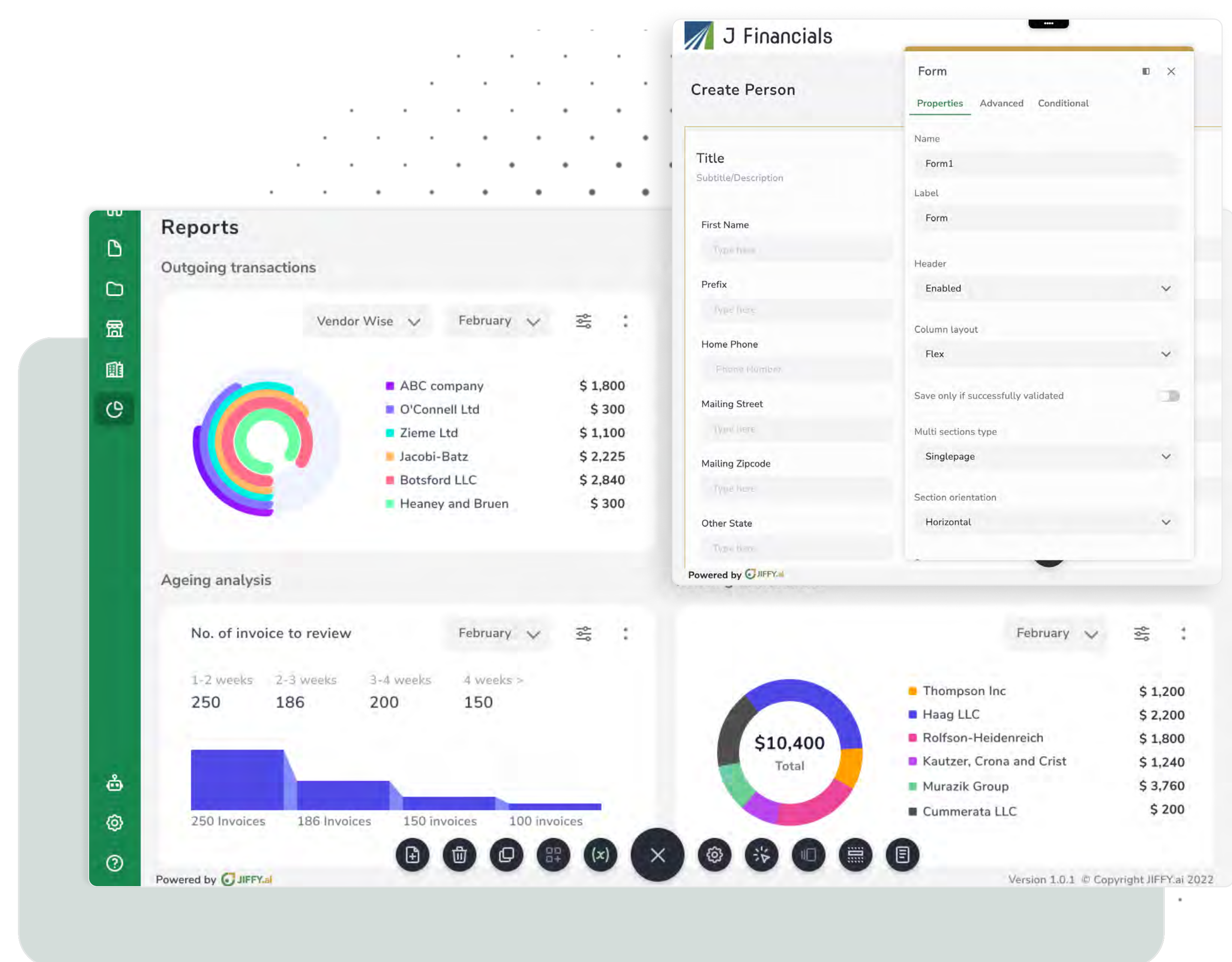
UI Automation / RPA

Automate repetitive manual steps on-screen for web, desktop or legacy applications. Streamline interconnections with legacy systems without APIs.



AI Builder

Build or integrate AI models for understanding structured or unstructured documents, and drive autonomous decision-making.



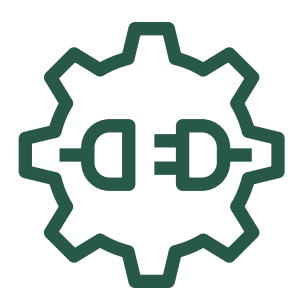
ETL Engine

Perform powerful large-volume Investor/advisor data transformations, and set them up with a few clicks.



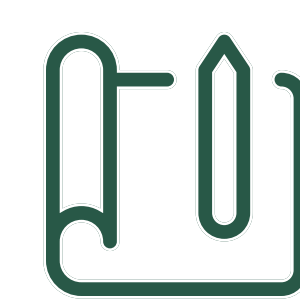
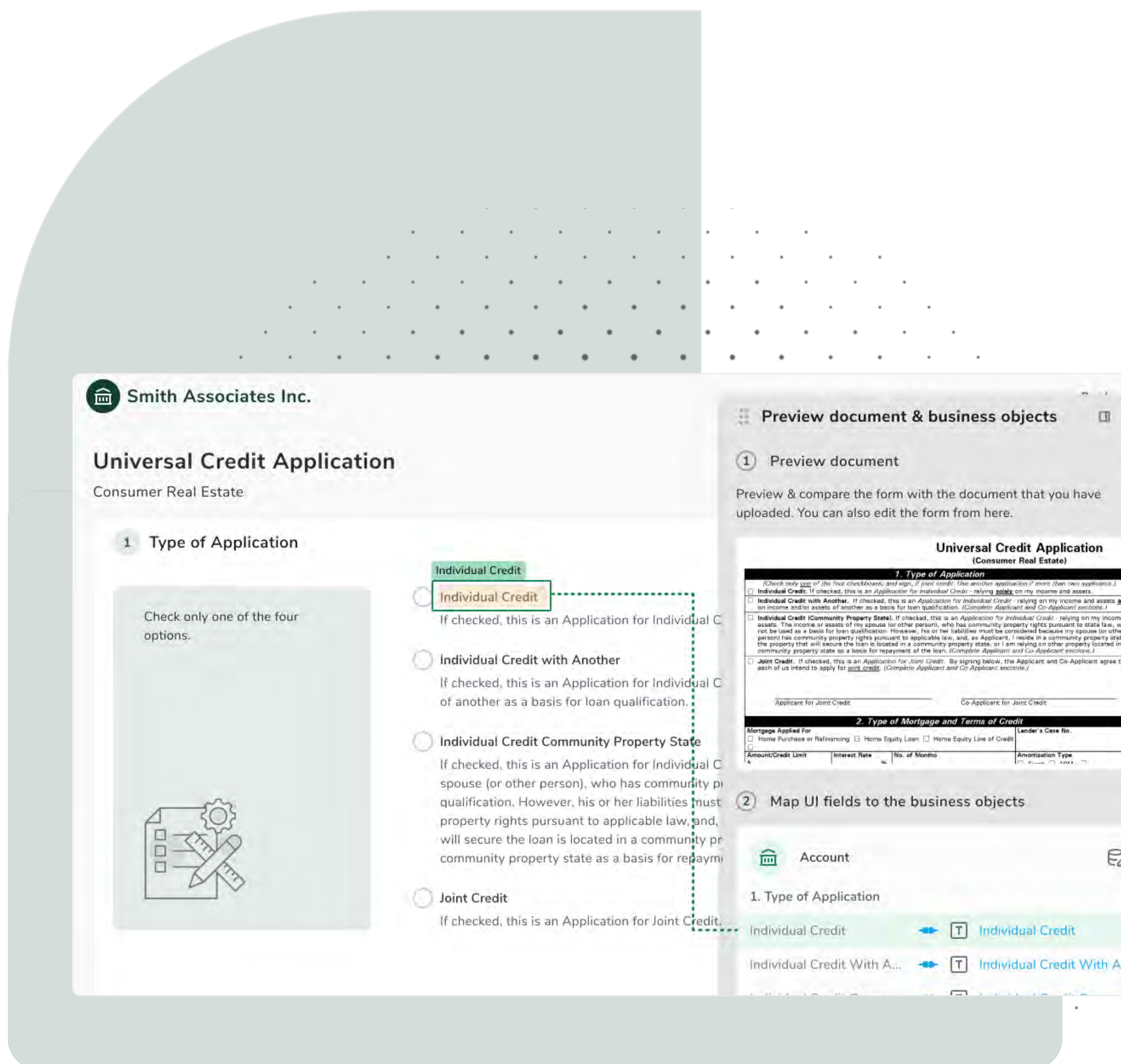
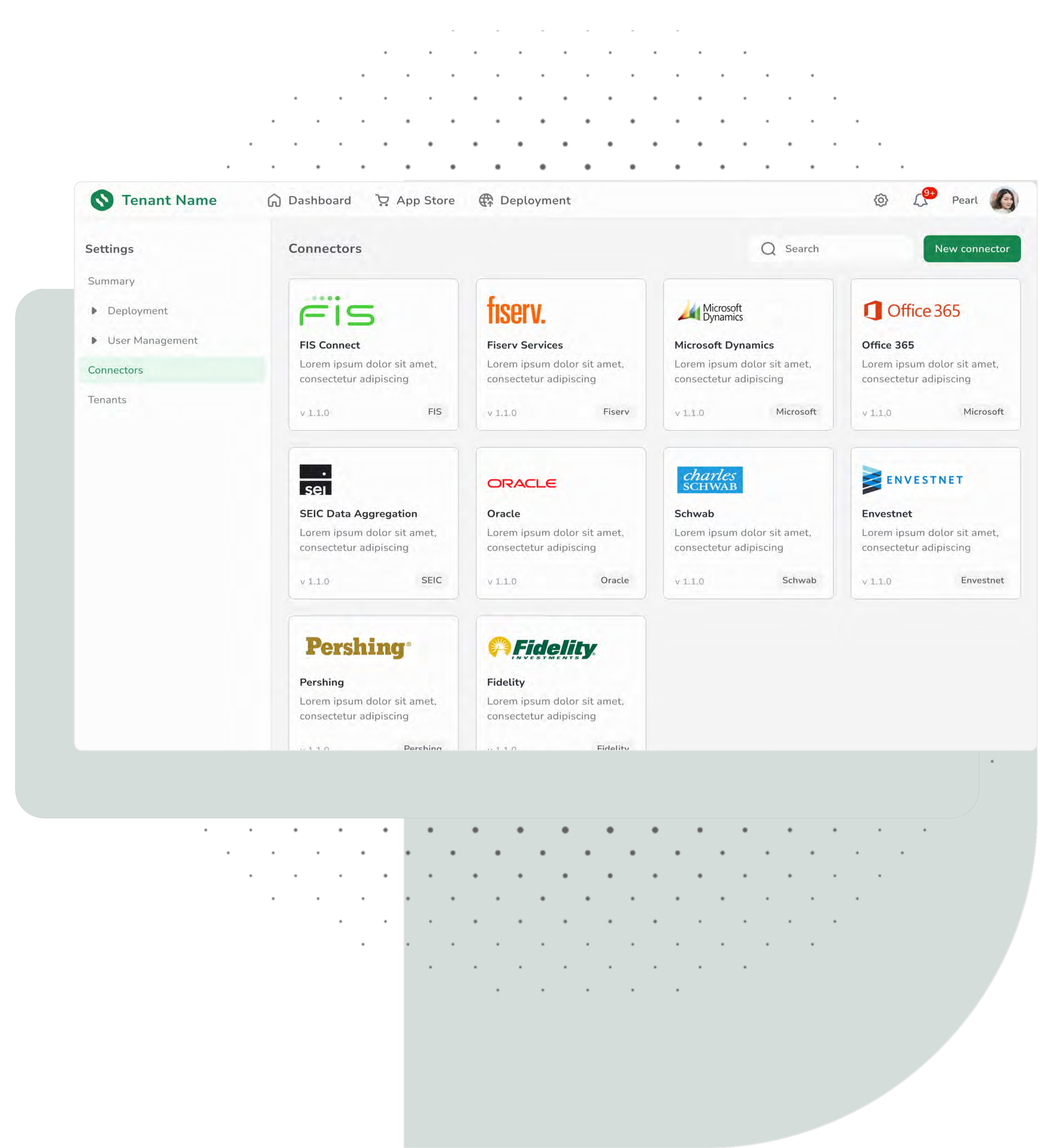
Data Editor

Model your business data with domain-ready business objects.



Connector Framework

Leverage pre-built integrations across standard applications, or build new connectors on-the-fly.



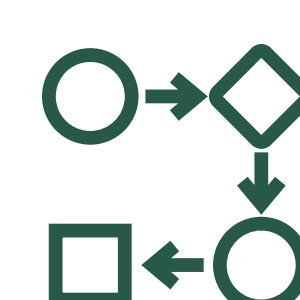
Application Blueprint

Build your stories and understand how your application components come together.



Digitizer

Use AI models to convert PDF forms into digital forms in a jiffy, and create UI and Business Objects that closely mirror the input file.



Workflow Orchestrator

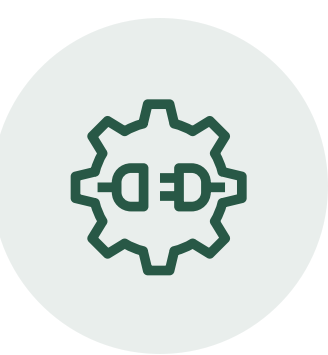
Invoke design tasks and workflows from the UI or APIs.

The JIFFY.ai Advantage



We speak your language

Our automation applications solve the industry's most pressing challenges, from investor- and advisor-facing needs to automating middle and back offices. Clients love working with our product experts who have rich Wealth Management experience.



We Integrate Across the Ecosystem

JIFFY.ai fully integrates with your business ecosystem as a true modern and comprehensive technology backbone.



We fast-track your transformation

Modular and easy-to-deploy, JIFFY.ai's full-stack, extendable, no-code platform delivers rapid ROI and speeds up time to market.



JIFFY.ai's no-code platform and HyperApps enabled Cetera to build sustainable digital business operations and provide seamless transaction experiences to clients and financial advisors. With this partnership, we were able to boost process transparency and accuracy, reduce dependency on offshore outsourcing models, and manage risk more efficiently.

**Brent Gaddis, Head of Strategic Operations,
Cetera Financial Group**



Built on AI and no-code technologies, JIFFY.ai's full-stack platform enables banks, financial services companies, and Fortune 500 organizations to solve their pressing operational and efficiency challenges. Our ready-to-deploy HyperApps help business users to improve consumer experience and realize the true value of digital transformation in a fast-tracked timeline. Learn more at <https://jiffy.ai/wealth-management>.

We are backed by **Eight Roads Ventures, Iron Pillar, R-squared, Nexus Venture Partners, Reaction Capital, Rebright Partners**, and other investors.

Trusted by leading companies like yours



Like what you see so far?
Schedule a demo to see it all in action!

Request Demo

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