Documentd

COMMUNICATION GUIDE 04

PRIVATE WEALTH

Deliver documents clients can always find

A practical guide to choosing the right approach for different client communications, from everyday messages and live portfolio information to important documents clients may need to keep for years.

A COMPLETE APPROACH TO CLIENT DOCUMENTS

Different documents do different jobs

Wealth management systems, email and messaging, client portals and Documentd each serve a different purpose. The right choice depends on the job: creating and managing client information, communicating, providing access and interaction, or permanently delivering an important document to the client. Using each in the right way creates a better client experience and reduces avoidable support queries.

01

Core systems

CREATE & MANAGE

Manage portfolios, client information, events and transactions.

02

Email & messaging

COMMUNICATE

Updates, reminders, meeting communications and everyday client contact.

04

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DELIVER, KEEP & FIND

Deliver permanent, client-owned copies that remain private, accessible and easy to find.

03

Client portal

ACCESS & INTERACT

Secure access to live portfolio information, valuations, transactions and services.

No single channel is right for every communication. Email works well for transient messages, client portals for live portfolio information and interaction, and Documentd for important documents that ought to become permanent, client-owned records.

PRIVATE WEALTH IN PRACTICE

Choose the right approach for each communication

Client portals are the right place for live portfolio information, valuations and ongoing interaction. Email and messaging handle everyday communication and reminders. Documentd is designed for important, point-in-time documents clients may need to retain and find again years later. Using each appropriately gives clients a clearer, more convenient experience and helps reduce avoidable support queries.

Email & messaging

COMMUNICATE

Best for everyday communication, reminders and prompts to take action.

- **Meeting reminders**
- **Service updates**
- **Requests for information**
- **Portal notifications**

Client portal

ACCESS & INTERACT

The right place for live portfolio information and ongoing interaction.

- **Current valuations**
- **Portfolio holdings**
- **Transactions**
- **Interactive reporting**

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DELIVER & RETAIN

For important point-in-time documents clients should keep.

- **Portfolio statements**
- **Tax documents**
- **Investment reports**
- **Suitability reports**
- **Executed agreements**

Documentd

Important documents should stay with the client. Documentd delivers permanent, client-owned copies into each client's own private document home, where they remain easy to access and find again.

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SECURITY & TRUST

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