Be in Control in 30 days

Contract Signature

Portfolio Information Collection

PHASE I (1 - 4 weeks)

Bank access (LOAs)

Build account framework

Load private investment transactions

PHASE II (2 – 6 weeks)

Load initializing balances

Reconcile beginning values

Create report groups

PHASE III (1 – 2 weeks)

Build report models

Personalize classifications

Create user access

PHASE IV (1 week)

Review reports

Training

GO LIVE

ONBOARDING 1 TO 3 MONTHS