

Northern Trust Global Family Office User Journey



DISCOVER

Prospective client engages with Northern Trust experts and discuss current processes, structure, challenges, and needs.



LEARN

Based on initial conversations, Northern Trust identifies and presents solutions to the prospective client and their key stakeholders. Northern Trust will continue the conversation(s) until all stakeholders are equipped for decision making.



PROPOSE

Northern Trust will build a customized proposal based on our understanding of the prospect's needs and structure. The proposal will outline services in scope as well as estimated fees.

Accept



ONBOARD

New client will receive a dedicated servicing team that includes technology experts. This team will generate and execute a custom onboarding and implementation plan.



SERVICE

Dedicated client servicing team will continue to remain engaged. Client-specific technology consultants are continuously available for day-to-day questions as well as strategic advice.