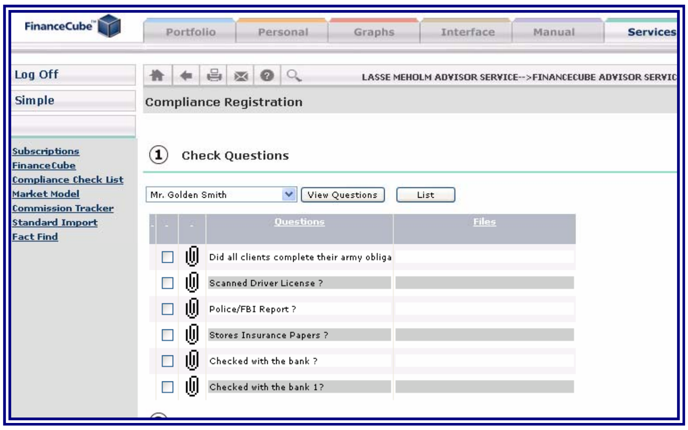
Value Added Services

Customer Compliance

Know Your Customer is more than know what risk level and asset allocation to select.
Money laundering and terrorist activity have set a new standard for what your company must do before taking on a new client.

AdvisorCube Compliance is designed both for small and large IFA companies, as well as for large network of IFA’s.

Network and Company - set up.
Network and Company management design the compliance form and what documents to store. Compliance can include text, check boxes and file uploads.



Adviser client communication.
Adviser have the communication with the client and fill in the form and upload files and documents.

Advisor follow up.
Adviser have a number of follow up reports and analysis.

Management follow up.
Company and network management have a number of follow up reports.
•Per company
•Per advisor
•Per client