

Introduction

Our consolidated onboarding program provides a clear path for adviser firms and wealth managers looking to onboard a large number of clients and assets onto the platform in a coordinated and efficient way, whilst minimising risk. It works particularly well for:

- Firms going through mergers or acquisitions
- Businesses migrating an entire book of clients
- Larger firms aiming for consistency and control
- Organisations seeking a structured, project-led onboarding experience

While our standard client-by-client onboarding journey is smooth and efficient, the consolidated option gives firms the flexibility to work with our project team and to choose and plan an approach that best aligns with their scale, timelines, and strategic goals.

Benefits of Consolidated CLIENT Onboarding

✓ 1. Data Security & Efficiency

We can take an export from your back office system and load it directly into the platform, creating thousands of client records in one seamless upload. Avoiding unnecessary “double-keying” and ensure data integrity.

✓ 2. Automated or Adviser-Controlled Account Applications

Once client data is loaded, account applications can be triggered automatically as a designated group or can be sent individually by advisers/admins at the moment that best suits your firm’s workflow and client communication strategy.

✓ 3. Ideal for Firms Managing Data at Scale

Starting with a complete client file ensures a structured, centralised onboarding process, especially useful when consolidating asset registers from multiple sources.

Benefits of Consolidated ASSET Onboarding

✓ 1. Firm Level Letters of Authority (LOAs)

Instead of clients signing an individual LOA per product, a firm-level LOA can cover all clients with assets in that product, or with a particular provider. This reduces document touchpoints and significantly accelerates reconciliation and onboarding. Existing agreed processes with providers allow for ongoing, accurate client data management.

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✓ 2. Shorter Overall Asset Journey

Running client and asset onboarding together means our operations team can begin to reconcile assets at the same time as client accounts are being created. Through our existing relationships with providers, we can leverage our large-scale data flows from providers to help shorten overall onboarding timelines.

✓ 3. Strong First Impression for Clients

With an asset register provided upfront, we can pre-load reconciled assets in advance. Clients benefit from early visibility of their holdings, setting the right tone from the outset and reducing the operational load on adviser or admin teams during the transition.

Why Firms Choose Consolidated Onboarding

- A streamlined, project-managed approach with scheduled updates and clear milestones
- Significant reductions in manual processing and document handling for adviser and admin teams
- Ideal for firms looking to move entire asset registers efficiently, especially post-acquisition
- Provides consistency when onboarding clients from multiple legacy systems
- Helps accelerate both client and asset onboarding by running the two processes in tandem
- Ensures minimal interruption to investment activity, with advisers being able to access the automated digital applications at scale (once client accounts are authorised).

Interested in Exploring Consolidated Onboarding?

If you'd like to walk through timelines, data requirements, or what bulk onboarding would look like for your specific setup, we'd be happy to discuss this on a call. Reach out to our team on support@growthinvest.com to organise a session or for more information.

For more information on our BAU onboarding process, please review our [Transferring and Onboarding Assets](#) guide.