



# Client Digital Onboarding Platform

*Digital account opening & KYC automation for  
portfolio management*

★ *Convenient*

★ *Omnipresent*

★ *Due Diligent*



for



Portfolio Management



Financial Services



Wealth Management



Capital Markets



Securities



Trusts & Family Office

“Make your clients’  
first touch point  
superior & simple!”

# Best-of-Breed Onboarding Solutions

*for portfolio Management*



## Digital-Only

Built & powered by advanced technologies



## Fully Integrated

Smart API connectivity with all regulators'



## Ready to Use

Exclusively designed & developed for portfolio management



## Compliant

Meets all regulatory requirements

iStart 3.0 is a neo-tech digital client onboarding and KYC automation platform developed specially for Asset & Wealth managers. It is built with a common goal to create intuitive and frictionless digital onboarding journeys while delivering the finest client experience.

Our platform transforms the legacy onboarding journeys into quick, simple and enjoyable experience, enabling clients to open their new portfolio account within short turnaround times.

With the advanced regulatory integrations, data validation and video identity solutions, iStart 3.0 allow portfolio management companies to collect, identify & validate clients data with zero human intervention automating the entire KYC process.

## How iStart 3.0 works?

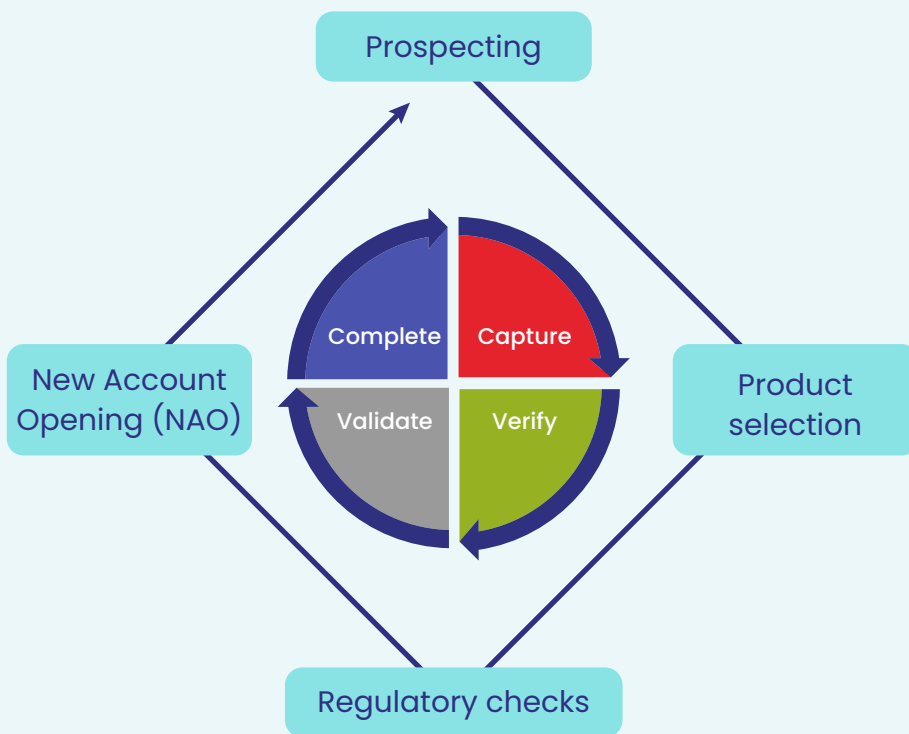


Fig : 1.0 iStart 3.0 – Digital onboarding eco system

A holistic next-gen digital onboarding eco system for portfolio management industry to incorporate client-first approach to reduce complexity & increase revenue performance.

### Capture

With advanced E-KYC integration, the client data is collected from regulatory database with single click.

### Verify

Verified using multiple regulatory database and AI-powered Video-KYC.

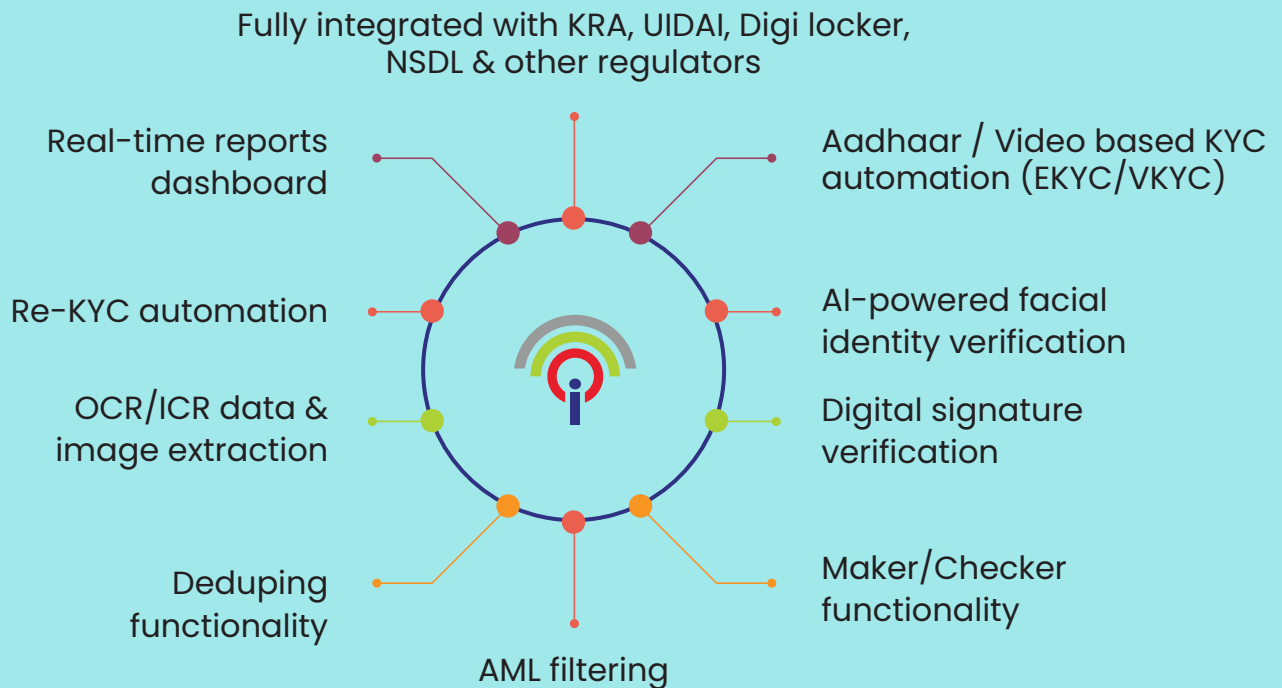
### Validate

Data validation using maker/checker functions to classify client risk potential.

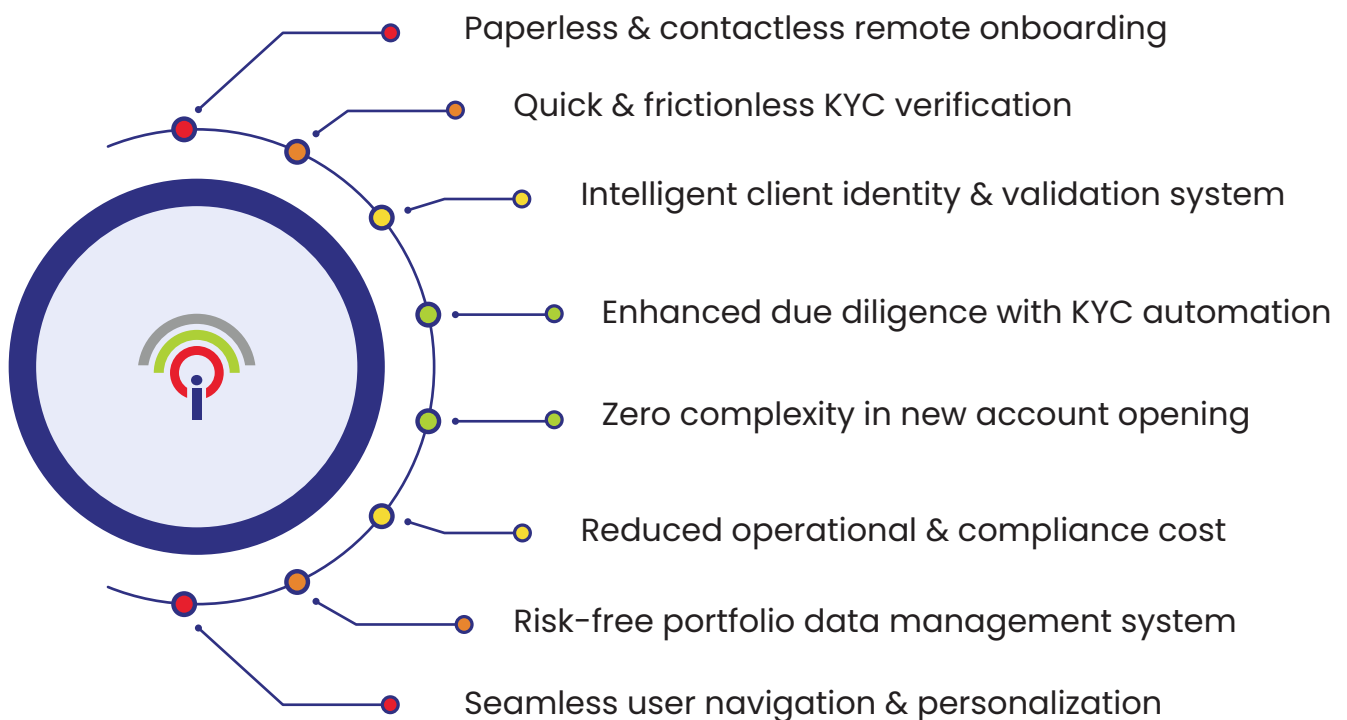
### Complete

Automated account activation alerts to the end client.

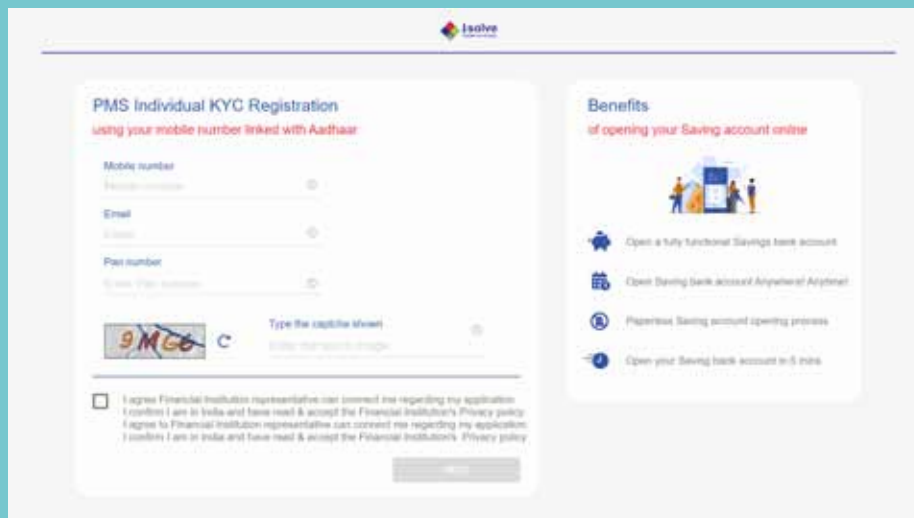
## Superior Features of iStart 3.0



## Stunning Benefits of iStart 3.0

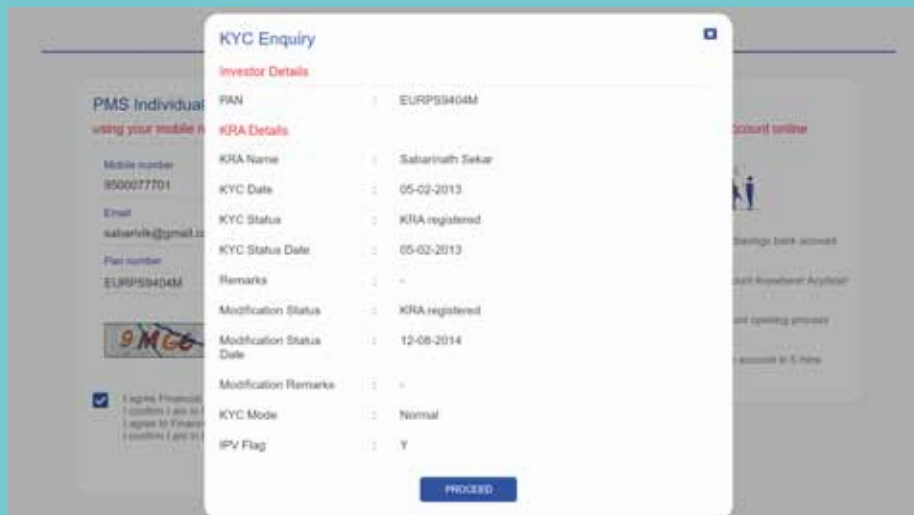


# Platform Dashboards



The screenshot shows the 'PMS Individual KYC Registration' screen. It features a form for registration using a mobile number linked with Aadhaar. The form includes fields for Mobile number, Email, Pan number, and a CAPTCHA. Below the form is a checkbox for agreeing to the Financial Institution's privacy policy. To the right, a 'Benefits' section lists advantages of opening a saving account online, such as opening a fully functional account, instant opening, and quick processing.

Fig : 1.1 iStart 3.0 Client login screen



The screenshot displays the 'KYC Enquiry' screen, showing investor details for a user. The details include PAN (EURPS9404M), KRA Name (Saharash Sekar), KYC Date (05-02-2013), KYC Status (KRA registered), KYC Status Date (05-02-2013), Remarks, Modification Status (KRA registered), Modification Status Date (12-08-2014), Modification Remarks, KYC Mode (Normal), and IPV Flag (Y). A 'PROCEED' button is visible at the bottom.

Fig : 1.2 iStart 3.0 KRA information screen



The screenshot shows the 'Video verification' screen. It features a video call interface with a user and a representative. Below the video call, there are sections for 'Customer details' and 'Verification details'. The 'Verification details' section shows a list of verification steps, each with a status bar indicating completion (e.g., 100%). The steps include Aadhaar Photo, PAN Card, Bank Account Photo, and others. A 'Verify' button is visible at the bottom right.

Fig : 1.3 iStart 3.0 Video verification screen

# Platform Dashboards

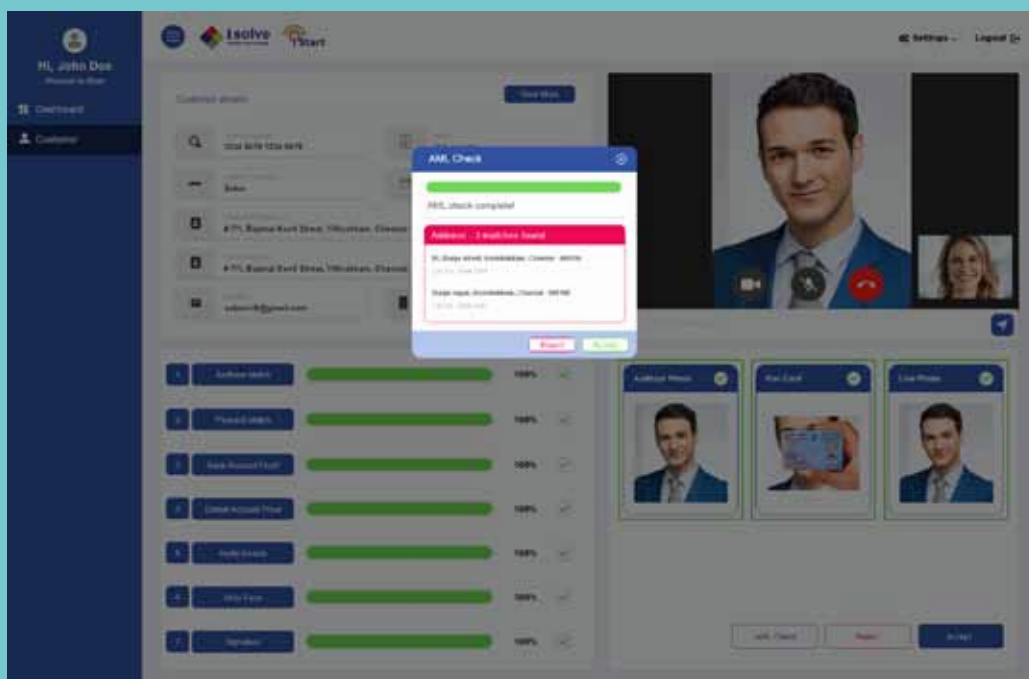


Fig : 1.4 iStart 3.0 Anti money laundering verification screen

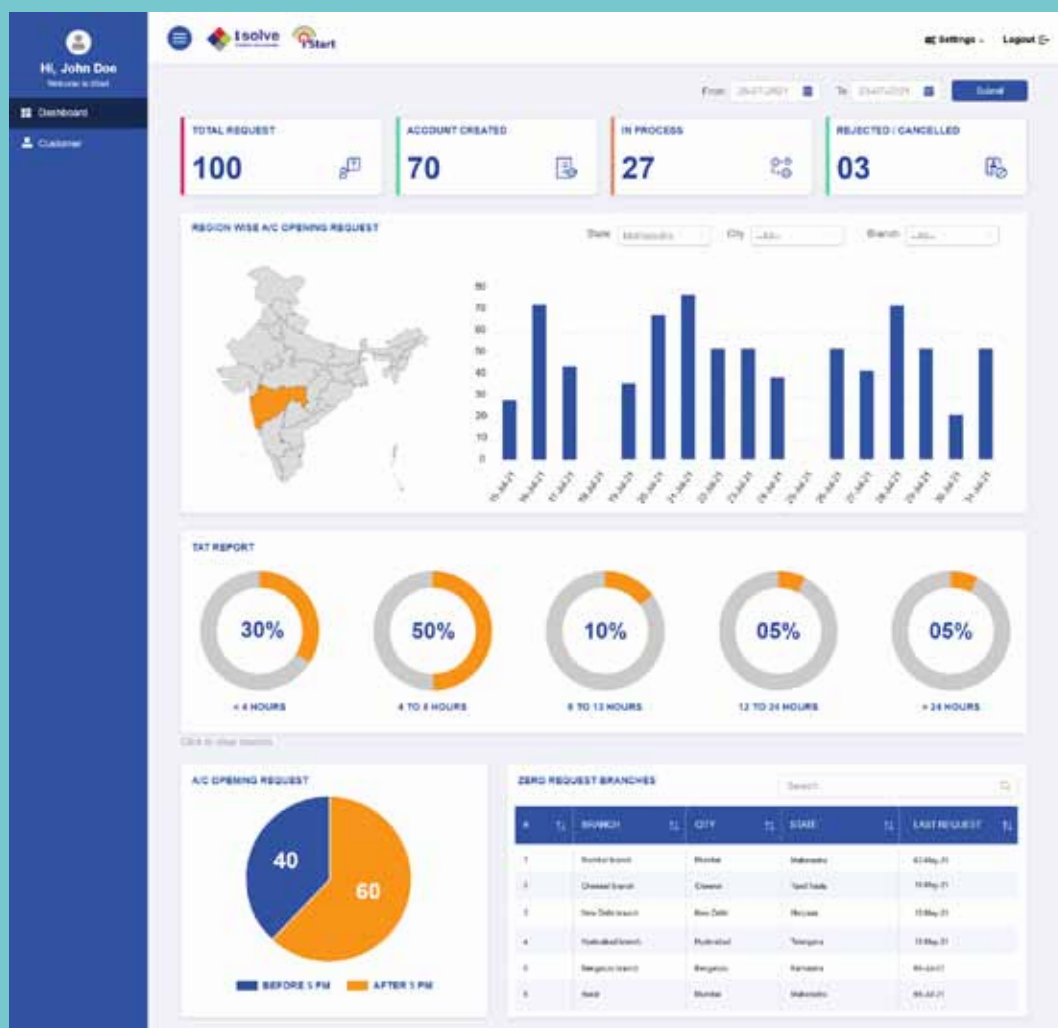


Fig : 1.5 iStart 3.0 Real time reports dashboard

## Our Key Clients



## Contact Us



Srinivasan

AVP - Business Growth

+91 91766 15121 | [srinivasan@isolve.global](mailto:srinivasan@isolve.global)



Ajay Mandlik

Regional Head Business Development

+91 98198 48685 | [ajay.mandlik@isolve.global](mailto:ajay.mandlik@isolve.global)



# Transform Your Business.