

CASE STUDY

Building a Digital Client Experience



Challenge

Pershing's Technology Consulting team began working closely with a new digital RIA prospect firm that was looking to utilize Pershing's APIs and standard files to build their digital client experience, which included a new paperless account opening process. This firm signed on as a Pershing client and Pershing's technology consultant worked closely with the Business Development team to determine and document what the client was looking to build and how the Pershing suite of solutions could help them achieve this.



Solution

Once Pershing had built all the flow documents, Pershing's technology consultants worked with NetXServices and Implementation teams to manage the development and implementation of the 13 APIs they're leveraging for the experience. **Ultimately, as a result of this engagement, the client was able to build their custom experience and roll out a completely digital account opening process (click-to-sign) to their clients.**

This case study is not intended to guarantee or represent that all firms will achieve the same or similar results.

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pershing.com

One Pershing Plaza, Jersey City, NJ 07399

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