



FIS Lifecycle Manager

Unlock automation and supercharge the customer experience at every stage of the journey



Traditional service approaches must change

Customers don't just want more responsive, personalized services; they increasingly expect them. Yet the pressure to provide rich, frictionless interactions that combine seamless digitization with white glove experiences, while meeting complex regulatory obligations, is piling ever-greater strains on institutions' servicing capabilities.

Hobbled by legacy platforms and laborious manual processes, many firms are struggling to deliver the enhanced data and slick functionality needed to strengthen the client relationship – and keep ahead of competitors. Efforts to significantly improve their service leave institutions battling to contain operational costs and optimize use of resources.

- Relying on disparate systems to support different servicing tasks hinders operational efficiencies and business scalability.
- Up- and downstream systems that don't seamlessly talk to each other prevent automated data exchange, creating errors, bottlenecks, excessive cost and staff frustration.
- Legacy infrastructures lack the capabilities to deliver the rich, digitalized interactions that are now a must-have part of the servicing mix at every stage of the client relationship.
- Failure to meet tough regulatory obligations in shortening timeframes increases legal, financial and reputational risks.

To win customers' trust, sustain a competitive edge and make their money work harder, firms need a radically improved approach.

The solution for end-to-end client services automation

Client expectations for faster, easily accessible services are raising the bar on firms' technology capabilities.

FIS® Lifecycle Manager provides a complete client services and compliance ecosystem on one integrated platform. Seamless, digitized interactions add value for customers and minimize the administrative effort, unlocking scalable business growth and making investments work harder.

1. Slash onboarding times

Secure online form completion and ID verification digitalize and accelerate processes, reducing the time to onboard by up to 80%.

2. White glove customer experience

High quality, on-demand services strengthen the client relationship and cut churn rates.

3. Boost revenues

Faster onboarding, better management information and happier customers help increase opportunities to accumulate assets and cross-sell services.

4. Minimize operating costs

Reduce FTE costs by up to 70% through seamless client servicing and compliance process automation.

5. Strengthen compliance controls

Automate complex, multi-jurisdictional AML/KYC and tax reporting compliance requirements.

6. Mitigate risk

System-driven actions replace expensive and error-prone manual processes to minimize operational, regulatory and reputational risk.

Grow with the industry gold standard

Trusted by leading financial institutions across North America, Europe and APAC, FIS® Lifecycle Manager takes care of all your client servicing tasks, however complex, to help investments work harder.



Fast, secure client onboarding

Digitalize end-client onboarding with customizable, risk-based AML/KYC checks, advanced beneficial owner screening, secure ID verification and digital signatures. The system pulls in jurisdiction-specific compliance requirements to dynamically adjust the information needed. Data and documents can be shared across regulations and jurisdictions to minimize duplicated effort.



Perpetual KYC

Automated account reviews ensure documents and data remain current, while ongoing screening and risk profiling track any change in client status to allow users to manage by exception. Real-time transaction and behavior monitoring flag suspicious activity to pre-empt potential issues.



Elevate client interactions

A white-labeled, multi-functional portal offers secure online form completion, access to detailed account information across a range of views, on-demand client self-servicing and responsive client/firm interactions. Customizable report creation and distribution further enhance engagement.



Improve oversight

Real-time oversight from a centralized dashboard enables users to monitor client statuses, track high-risk accounts, view activities, identify problems and bottlenecks, and track and meet SLAs.



Streamline processes with intelligent workflows

Integrated workflow management allows users to build robust controls and tailored rules that trigger automated actions for any repeatable task. Configuring the procedures each business process must follow and routing tasks to relevant teams optimizes operating efficiencies, and ensures higher quality client support and regulatory compliance.





Maintain regulatory compliance

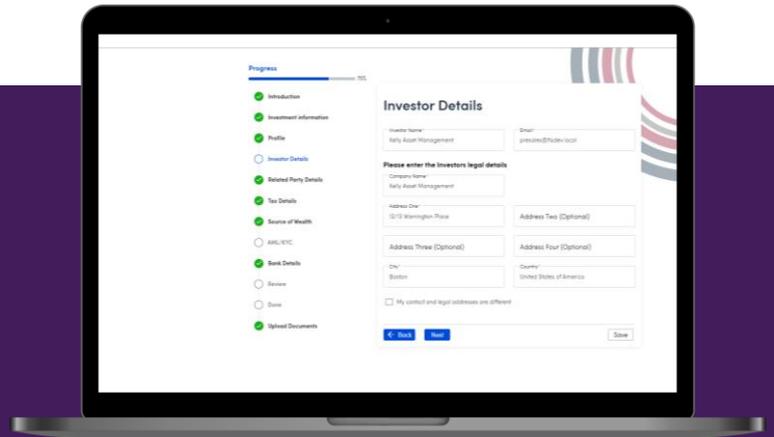
Ongoing due diligence checks all AML/KYC and FATCA/CRS-related client documents and data are up-to-date. Automated collection and smart validation of tax and self-certification forms ensure they are populated in line with jurisdictions' latest tax laws. Regulatory reports are generated automatically in filing-ready state to minimize the compliance burden.



Seamless system integration

Seamless connectivity to other FIS and external up- and downstream systems extends the integrated ecosystem, enabling real-time data exchange to automate key post-trade functions. And all processes are wrapped in best practice user and data security protections.

Make your money work harder. Unlock the operating efficiencies and exceptional client satisfaction your business needs today with **FIS® Lifecycle Manager.**



Money at rest Money in motion Money at work™

FIS provides a complete compliance ecosystem service to unlock growth.

Our **technology** powers the global economy across the money lifecycle.



Money at rest

Unlock seamless integration and human-centric digital experiences while ensuring efficiency, stability, and compliance as your business grows.



Money in motion

Unlock liquidity and flow of funds by synchronizing transactions, payment systems, and financial networks without compromising speed or security.



Money at work

Unlock a cohesive financial ecosystem and insights for strategic decisions to expand operations while optimizing performance.

About FIS

FIS is a financial technology company providing solutions to financial institutions, businesses and developers. We unlock financial technology that underpins the world's financial system. Our people are dedicated to advancing the way the world pays, banks and invests, by helping our customers confidently run, grow and protect their businesses. Our expertise comes from decades of experience helping financial institutions and businesses adapt to meet the needs of their customers by harnessing the power that comes when reliability meets innovation in financial technology. Headquartered in Jacksonville, Florida, FIS is a member of the Fortune 500® and the Standard & Poor's 500® Index. To learn more, visit FISglobal.com. Follow FIS on LinkedIn, Facebook and X (@FISglobal).



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