IFS MAINTENANCE

ENSURE THAT YOUR TEAMS CAN MANAGE USER ACCOUNTS WITH EASE.

Routine servicing and changes are constantly being performed on accounts; so why does each have a separate process? IFS Maintenance finally creates one point of entry and a consistent process for transactions, enabling dozens of client, household, and account data points to be updated with a single request. Updates can now be synchronized across multiple systems, narrowing the to-do list and making the routine things actually have the ease of routine.

FEATURES:

- Update account contact information
- Update account demographic information; such as employment, suitability, and financial details, investment strategy, and risk tolerance.
- Add, update, or remove beneficiary information and comply with various custodial data requirements.
- Add, update or remove interested parties on the account; such as Power of Attorney, accountants wanting copies of statements and tax forms, etc.
- Add, remove, or update account features; such as margin instructions and options trading.
- Maintain compliance with the CARES Act by easily modifying the Trusted Contact information for accounts.
- Update account settings for things like dividend reinvest instructions, money market sweep funds, default tax methodology, and client handling of trade proceeds.
- Extend maintenance activity to all related accounts within the single user experience.
- Maintain a certified business process with the IFS "out of the box" Solution Suite

BENEFITS:

- Increase efficiency by updating multiple related accounts at once.
- Manage basic maintenance needs with a single comprehensive product.
- Synchronize changes across your enterprise, a process that historically is made up of disparate systems that do not talk to each other.