

# DIGITISATION, RISK, AND SUSTAINABILITY IN FINANCIAL SERVICES

## THE IMPORTANCE OF DIGITISATION

COVID-19 has not only accelerated digital transformation in many financial services organisations but also changed how clients access information. Artificial intelligence and machine learning are a key part of that digitisation and help to automate processes. For the financial services organisations that do this, it means they are able to speed up many important projects, such as:



Initial client communications



Document verification



Risk-proofing



Financial background checking



Legal documentation



**Digital transformation doesn't just happen overnight;** it is an ongoing process that requires a solid strategy, and continuous monitoring of results. If done right, digitisation can greatly benefit the advisor and the client.

## HOW TO STAY PROTECTED AGAINST FRAUD

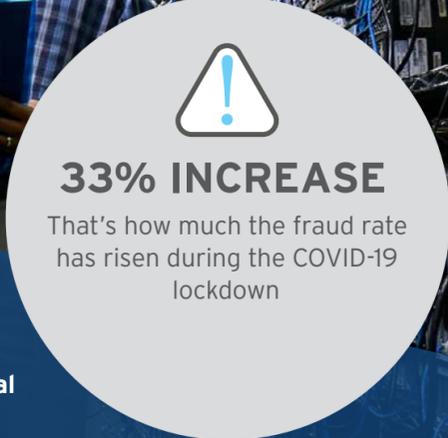
The risk for fraud in financial services is higher now than ever before.

### Three steps to help keep your clients safe

- 1 Keep account information and passwords confidential
- 2 Stay informed on the latest fraud scams
- 3 Work with a trusted member of the wealth management team



**Keeping fraudsters away takes continuous effort as their schemes are always evolving.** Consult a business partner who understands fraud and risk as well as security and compliance to offer the best protection to your firm and your clients.



## SUSTAINABILITY IN FINANCIAL SERVICES

Green IT and sustainability are becoming more important elements for organisations as investors want to conduct business with companies committed to good environmental practices.

### A Paperless Environment Offers an Array of Business Advantages



**Make the transition to green IT practices easier by working with a business partner** with experience guiding financial services organisations toward sustainability.

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