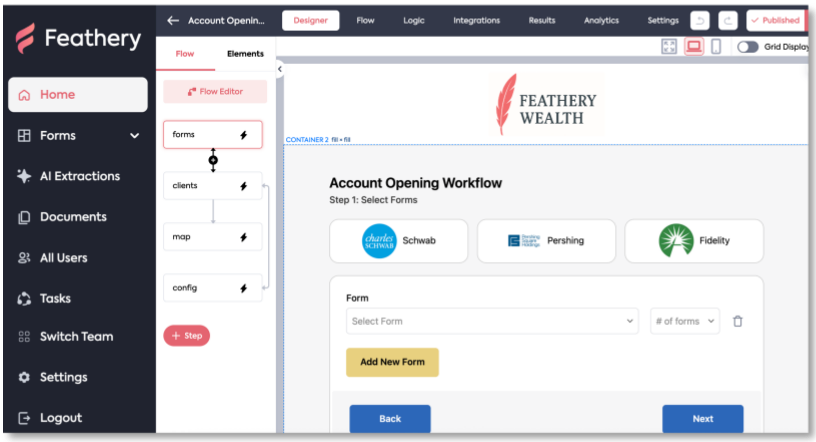

What is Feathery?

Feathery automates data intake workflows for broker-dealers and RIA – with AI powered client onboarding, account openings, and transitions.

Benefits our clients have seen

- Improved client experience with AI powered review of documents.
- 80% less time spent on onboarding by advisors and removing manual data entry.
- Eliminate NIGOs during the account opening process
- Confidence in client data across platforms

Key features

- Simple workflow builder for repapering and data gathering
- Bidirectional API integrations with major wealth tools
  - Custodians: Schwab, Fidelity, Pershing, and more.
  - CRMs: Salesforce, Dynamics, Redtail, Wealthbox
  - Planning & Portfolios: Orion, eMoney, Moneyguide, Morningstar, Black Diamond, etc.
- Automatic document scanning and autofill supporting 40,000+ managed PDF Library of forms from all major institutions (custodians, funds, etc.)
- Document intelligence to analyze data from investments, tax forms, estate plans, and licenses.

Case studies

SEQUOIA

Sequoia Financial streamlined their account opening process with Feathery, enabling automatic completion and signing of custodial documents. They also digitized and automated their own custom forms for a seamless onboarding experience.

CERITY PARTNERS®

Cerity Partners automated client data collection and account onboarding using Feathery. Their solution syncs data with their CRM, custodian APIs, and key financial planning platforms such as eMoney.

Example use cases

- Streamline custodial account opening and transition workflows to unify data across your firm
- Automate document processing directly into your onboarding workflow with your unique customized questionnaires and risk assessments built in.
- Automatically extract custodial holdings information (ticker, quantity, cost basis, etc.) from investment statements and send it to planning tools.
- Scan advisor notes across disparate systems and take action on key data points.
- Record client meetings and prefill data into CRM