

The unique investor onboarding demands of alternative assets

Unlocking opportunity in alternative assets takes dedicated knowledge and innovative technology for a streamlined investor experience

Alternative assets are an ever more important part of the global investment ecosystem. But the onboarding process for these investments is complex, costly and must be tailored to the unique demands of each asset class.

Five trends to watch:



1. Alternative assets are on the rise

Appetite for alternative assets continues to surge, with investors drawn to the higher returns and diversification potential on offer. This growing participation, and broadening in the types of investors, is increasing demand for streamlined onboarding processes and enhanced investor experiences.

2. Tightening regulatory requirements

The growing reach and complexity of the alternative assets sector is prompting regulators worldwide to heighten their scrutiny. Each asset class faces unique and evolving compliance requirements including anti-money laundering (AML) regulations, Know Your Customer (KYC) standards and tax reporting obligations that are shaping the investor due diligence and onboarding process.



3. The regulatory landscape varies significantly

Globalization – as managers expand their reach to new investors and eye investment opportunities in international markets – exposes firms to a patchwork of regulatory regimes. Differences and growing divergence between, for example, the EU's more centralized approach vs the decentralized U.S. framework exacerbates cross-border compliance and tax regime complexities.

4. Need for tailored workflows

The different alternative asset classes have distinct onboarding processes that involve unique structures and documentation. Tailoring workflows and optimizing them to these unique requirements demands coordination between legal, operations, compliance and finance teams.

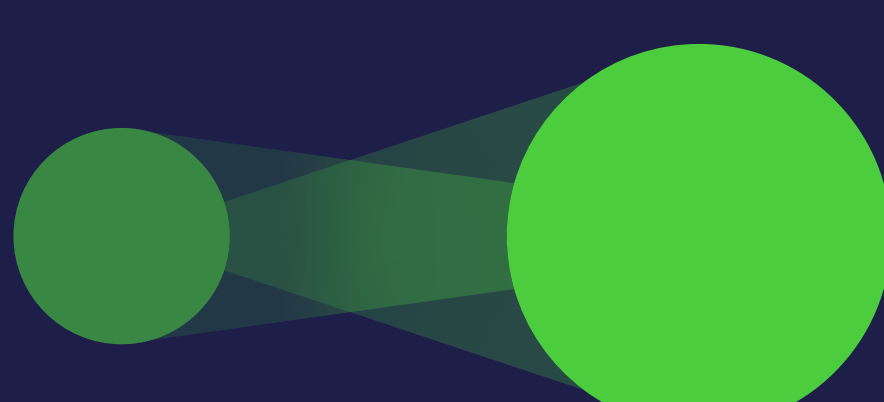


5. Automating processes

Investor onboarding often involves highly customized and costly, labor-intensive procedures including customer identification and verification, and processing of complex documentation. Integrating onboarding solutions with trading platforms and credit management tools is key to streamlining processes. Advanced technologies such as AI and machine learning offer significant opportunities for further automation.

Your next step

Unlock the financial technology that makes your capital investment work harder by automating the entire investor servicing lifecycle, streamlining complex tasks at scale while freeing you to focus on adding value. Discover how to simplify complex alternative asset onboarding processes to streamline investor experiences, stay compliant, minimize operational costs and make resources work harder.



Unlock the future of investor servicing now with FIS® – driving innovation in the financial industry.

FIS Investor Services Suite provides a complete investor services and compliance ecosystem to unlock growth for alternative and traditional fund managers and administrators on one integrated platform, adding value for clients and making investments work harder for streamlined investor services.

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.

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