

NuFund® Digital Account Opening



Convenient | Simple | Secure | Compliant

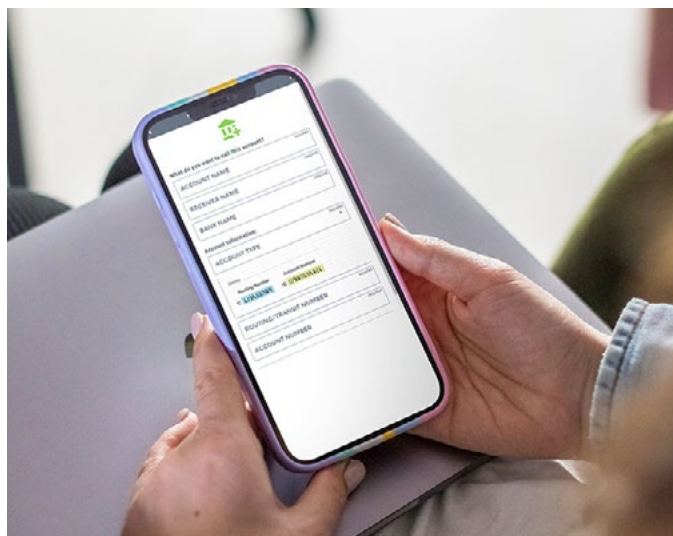
Streamline Your Account Opening

NuFund digital account opening software makes it easy for customers to start banking with you from the digital channels of their choice. This integrated onboarding solution guides users to open checking, savings, health savings and certificate of deposit accounts through an intuitive, customer-centric interface. By offering a superior digital experience that transitions directly to your digital banking platform, NuFund ultimately helps transform prospects into engaged customers.



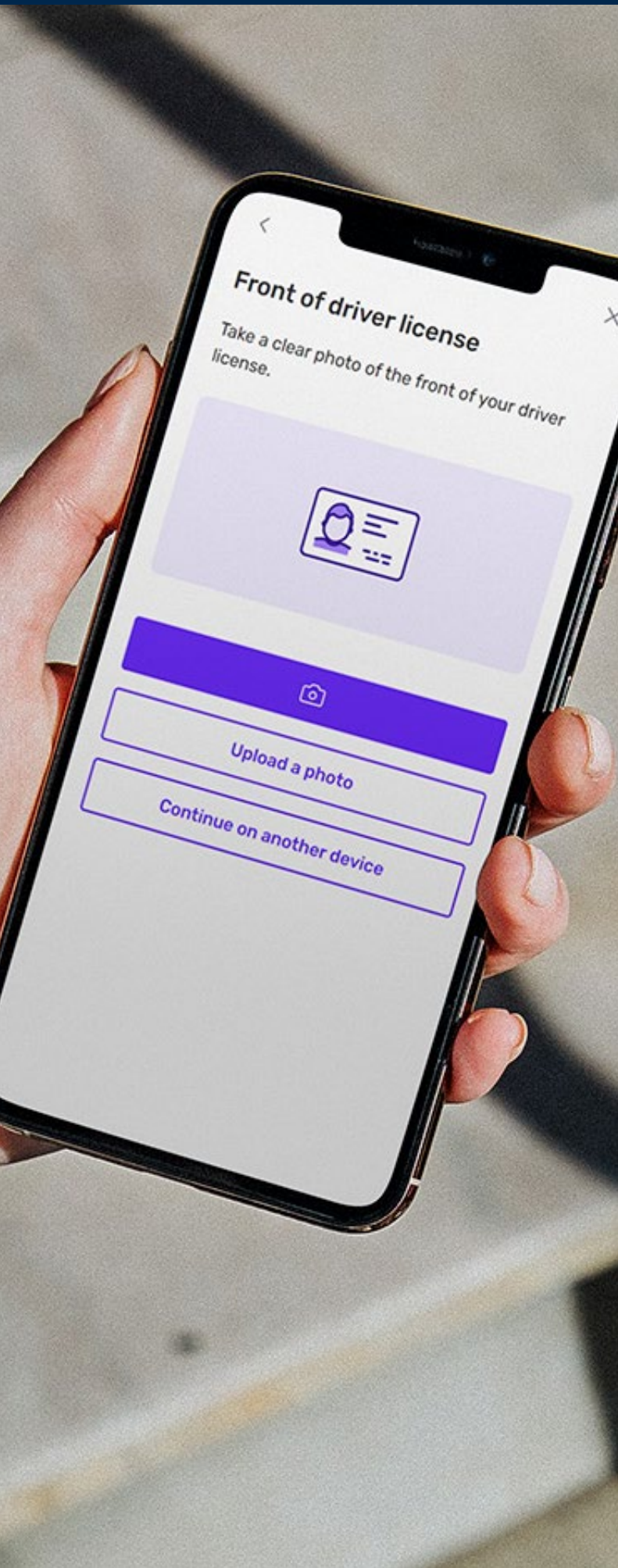
Remove Unnecessary Friction in Customer Acquisition

Banks win and lose customers through digital channels. By eliminating friction, NuFund reduces abandonment rates and drives new accounts. It can also work in tandem with LinkLive Banking's live chat and video collaboration, so your customers can receive banker assistance without ever leaving their digital account application.



With NuFund, Customers Can:





- Open new accounts from anywhere and on their favorite devices
- Enroll in digital banking and order debit cards, deepening engagement during that onboarding process
- Choose from a variety of accounts online without preselecting a product
- Save applications in process and resume at their convenience
- Autofill application information from existing core customer information files (CIFs)
- Access approved accounts instantly through digital banking
- Link new accounts to existing ones using PLAID in real time
- Fund accounts with debit cards, mobile check deposits and internal or external transfers
- Chat or have a video call with a banker to directly answer questions
- Receive HTML or PDF disclosures



Strengthen Account Opening Protections with Persona® Identity Verification

Enhance your financial institution's account opening measures by accurately and securely verifying applicants' identities. Integrating Persona into your operations creates an extra layer of security by prompting for an ID and performing a series of selfie checks. This process reviews the driver's license and/or state ID provided against a series of spoof detection protocols. The images taken during the verification process are collected and stored, which can be reviewed in your Persona dashboard.

Why Choose Persona?

-  **Selfie Liveness Check:** Account holders can use their preferred device to take a series of selfies for identity verification before opening an account. This helps protect both the customer and your financial institution from potential data breaches.
-  **Seamless Integration with NuFund:** Persona will be embedded into NuFund and the information will be stored in your Persona dashboard.
-  **Face and ID Comparison:** Utilize best in class facial recognition software to analyze collected selfies and cross-reference them with provided IDs to verify identity consistency.
-  **Optimized Conversion:** Available on all devices, this feature increases the speed in which you can authenticate users and protect your institution.



Why Consider NuFund Digital Account Opening?

NuFund's efficient and intuitive digital account opening process elevates the customer experience, accelerating customer acquisition and boosting revenue. It also meets digital expectations and streamlines onboarding and security by replacing costly, once-manual processes.



Improve the customer experience by leveraging data and analytics.

This account opening solution integrates with CSI IQ to ensure a holistic view of customer behavior. By offering reports on abandonment and accounts opened, NuFund's data capabilities help you provide better service, mitigate abandonment and meet customer needs.



Promote your brand as a forward-thinking institution.

NuFund widens your digital footprint, making it easier to reach customers outside your immediate vicinity and instill confidence in your bank's digital capabilities. It also highlights products and educational resources about your services along the way.



Safely automate backend processes for improved efficiency.

The auto-decisioning function reviews applicants' credit and fraud potential and only approves new accounts that meet your institution's standards. NuFund also requires ID verification with a one-time password for added security.

For more information about NuFund Digital Account Opening, contact your CSI Relationship Manager today!

