

Beyond PDFs: digitizing investor onboarding for hedge funds



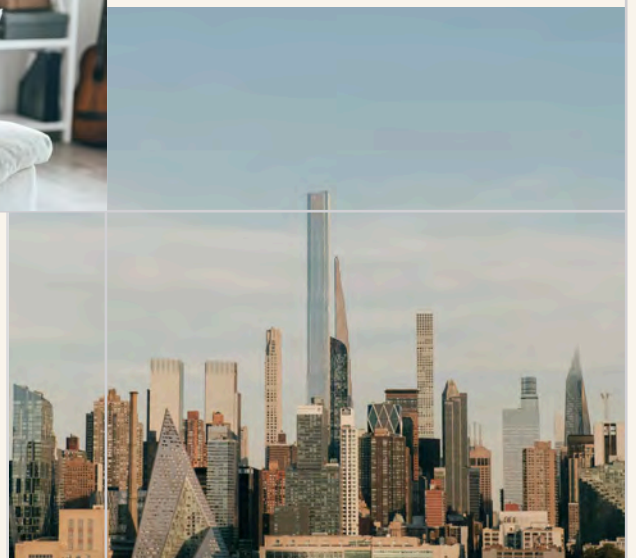
Beyond PDFs: digitizing investor onboarding for hedge funds

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How leading hedge funds are replacing manual work with secure, scalable, and compliant digital journeys

In a world where investors expect seamless digital experiences, onboarding remains one of the most outdated and painful processes in the hedge fund industry. PDFs, email threads, and manual data entry persist—introducing friction, errors, and regulatory risk.

This ebook explores how hedge funds can modernize investor onboarding with digital journeys that are fast, secure, and fully compliant—without adding complexity or dev burden.



The current state of investor onboarding

Just **13%** of wealth management experts say ultra-high net worth (UHNW) client onboarding takes less than one week, while **29%** report it takes three months or more. ([source](#))

Most hedge funds still rely on a mix of:

- **Static subscription** documents in PDF format
- **Email-based** communication and document collection
- **Manual validation** and compliance checks
- **Re-keying** of data into internal systems

This approach may seem “good enough,” but it comes at a cost: delayed onboarding, operational inefficiencies, frustrated investors, and increased regulatory exposure.

The average cost to onboard a new investor in wealth management is **\$6,000**, with estimates ranging from \$500 to \$25,000 depending on complexity. ([source](#))

Why traditional processes don't work anymore

74% of asset managers report investor loss due to prolonged or inefficient onboarding. ([source](#))

Today's investors expect more. They've grown accustomed to digital-first experiences in every part of life—from banking to healthcare.

Paper-based or manual investor onboarding processes:

- **Lack real-time validation**, leading to incomplete or incorrect submissions
- **Require back-and-forth** to collect signatures, IDs, and KYC documents
- Are **disconnected** from core systems like CRMs, fund admin tools, or compliance platforms
- Offer **poor visibility** into progress and bottlenecks

And for hedge funds, the stakes are high. Each delay not only frustrates investors—it risks capital deployment and credibility.

The business case for digital onboarding

Wealth managers slashed investor onboarding with digital tools from **45 days** to **6 days**, and in some cases to just **20 minutes**

Digitizing the investor onboarding process isn't just about UX—it's about scale, compliance, and growth.

Benefits include:



Faster time to fund

Accelerate the investor journey from days or weeks to hours



Compliance-by-design

Capture audit trails, consent, and documentation securely



Operational efficiency

Reduce internal manual work and human error



Scalability

Onboard more investors without growing your back office



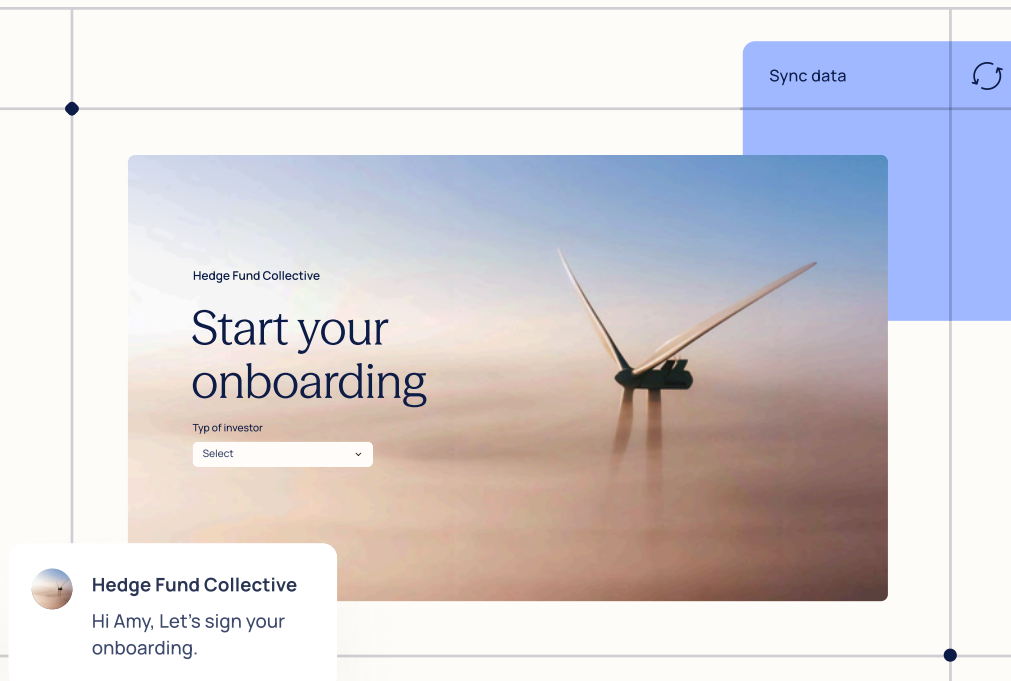
Better investor experience

Provide a smooth, guided, branded digital journey

What a modern investor onboarding journey looks like

With a platform like EasySend, the onboarding process becomes a guided, digital flow:

1. **Investor receives a secure link** to a branded journey
2. **The journey adapts** based on investor type (individual, entity, accredited, etc.)
3. **Data is validated in real time** (e.g., address format, required fields, document uploads)
4. **Signatures are collected digitally**, with full audit logs
5. **Data flows directly** into your CRM, fund administration tools, or compliance systems
6. **Progress is tracked**, and stakeholders are notified automatically



What a modern investor onboarding journey looks like

This replaces fragmented touchpoints with one seamless, trackable experience.

| Step | Traditional Onboarding | Digital Journey (EasySend) |
|----------------------|---|-----------------------------------|
| Document delivery | DF via email | Secure digital link |
| KYC checks | Manual email requests | Built-in upload & validation |
| Signature collection | eSignature tools (DocuSign), separate process | Integrated digital signature |
| Data capture | Manually re-keyed into CRM | Auto-synced to CRM/ Admin systems |
| Follow-ups | Chasing via email | Automated reminders + analytics |
| Time to complete | 2-8 weeks | 1 day to 1 week |



Compliance, security, and transparency

Hedge funds operate in one of the most heavily regulated sectors. Any onboarding platform must support:

- KYC/AML workflows
- Secure document collection and storage
- GDPR, SEC, and FINRA compliance
- Audit trails and activity logs
- Data residency and encryption at rest/in transit

EasySend offers enterprise-grade compliance and integrations, ensuring you meet global and jurisdictional regulations out of the box.

Are You Audit-Ready?

Does your current onboarding process:

- Capture digital consent with time-stamps?
- Track and log document version history?
- Offer real-time visibility into form completion?
- Prove ID and investor status verification?
- Maintain full audit trails per SEC/FINRA expectations?

How a Fortune 500 payments leader digitized 20+ onboarding processes in 10 days

A Fortune 500 global payments provider, faced a familiar challenge: too many fragmented, manual onboarding processes. They needed a fast, compliant, and user-friendly way to move merchants online—without relying on long development cycles or IT bottlenecks.

Using EasySend, the enterprise:

- **Transformed 20 paper-based processes** into a single digital onboarding journey—live in just 10 days
- **Reduced onboarding time by ~70%**
- **Eliminated 7+ email touchpoints** with automated flows and field validations
- **Integrated Salesforce CRM** to capture data in real time
- **Enabled self-service** updates to their journeys when changes were needed

"in just 10 days, Wordlines first complex contract was digitized" to "This global player in payments went live with its first complex onboarding process in just 10 days"

Urs Gubser, Head of Merchant Experience

How a Fortune 500 payments leader digitized 20+ onboarding processes in 10 days

How a global payments provider scaled digital operations fast:



No-code journey builder

Teams launched journeys quickly without dev support



Screen guidance

Support teams could guide users in real time



Validations & dynamic conditions

Validations & dynamic conditions



Omnichannel reminders

Automate follow-ups for missing data or documents



EasySign

Allow merchants to sign and track agreements digitally



Hi Jane,
we are missing your bank statements.

[Add missing documents →](#)

Business details

Business name

Type of business

Address

Hi Jane,
Let's start your
onboarding

Let's start



Top 5 digital onboarding use cases in hedge funds

Investor onboarding isn't a single step—it's a collection of interconnected processes that often span teams, systems, and compliance requirements. From collecting subscription documents to verifying investor status and coordinating multi-party sign-offs, each touchpoint introduces risk, friction, and manual effort.

Top 5 use cases

- **Fund subscription** document collection
- **Accredited investor** verification flows
- **Tax form** (W-8BEN/W-9) collection
- **KYC and identity** upload flows
- **Multi-party co-signing** flows for family offices or trusts

Digitizing these workflows not only speeds up onboarding—it improves accuracy, ensures compliance, and delivers a smoother experience for both investors and internal teams. Below are five high-impact use cases where hedge funds can gain immediate value by replacing static PDFs with dynamic digital journeys.

Why this matters for hedge funds

While Worldline focuses on merchant onboarding, the same needs apply to investor onboarding in hedge funds:

- Replace static PDFs with dynamic, intelligent journeys
- Speed up compliance while improving investor satisfaction
- Empower non-technical teams to build and adapt onboarding flows
- Avoid IT delays and reduce the cost of errors, follow-ups, and manual work

Why now?

- SEC enforcement actions around documentation up 22%
- Investors expect onboarding UX on par with fintech apps
- New funds must differentiate with experience, not just performance
- Global competition for capital makes first impressions matter

Takeaway: If a global payment provider can digitize 21 workflows in 10 days, hedge funds can do the same for investor onboarding—without starting from scratch.



Getting started: key considerations

If you're ready to modernize investor onboarding, keep in mind:

- **Start with your most painful process:** e.g., subscription documents or KYC collection
- **Map out roles and steps**—which teams are involved, where delays happen
- **Choose a flexible platform** that integrates with your systems
- **Prioritize compliance and security** from day one
- **Look for quick wins:** processes that can be launched in days, not months

Conclusion

In today's competitive environment, hedge funds need to move fast—without compromising on compliance or investor experience. Static PDFs and manual onboarding no longer cut it.

Modern investor onboarding is digital, dynamic, and data-driven.

With EasySend, hedge funds can build investor journeys that are simple for the investor and scalable for the business.

Ready to replace onboarding friction with smart digital flows?

[Book a personalized walkthrough →](#) [Start a free trial of EasySend →](#)



EasySend is a no-code platform that empowers enterprises to digitize complex customer-facing processes. Fast. From insurance onboarding to banking workflows and investor journeys, we help teams build secure, compliant, and dynamic digital experiences in days, not months.

Learn more at easysend.io