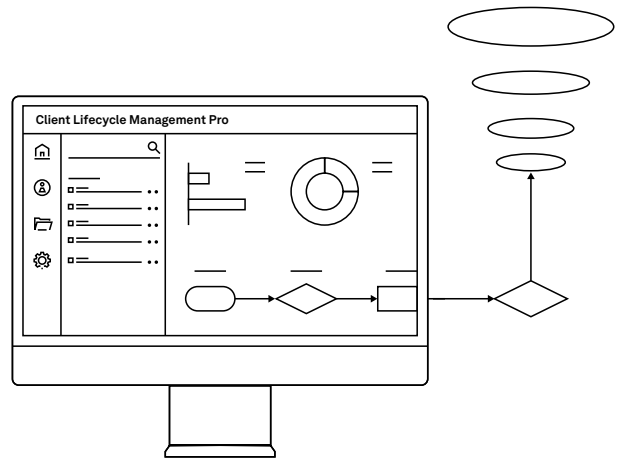


# Accelerate your **Client Lifecycle Management Process.**



**Rapidly implement our highly configurable solution that delivers clarity, compliance and operational ease and efficiency.**

Client Lifecycle Management Pro is a lightweight, highly configurable, end-to-end solution. From contract initiation through to account closure, CLM Pro makes the entire lifecycle management process efficient, transparent and easier to navigate for everyone involved.

With seamless integration – and fast implementation in a matter of weeks – CLM Pro delivers the essential infrastructure and workflow innovation to cycle through every event. It's all systems go from onboarding, with rapid account opening and all activity tracked for maximum visibility for all parties – both on and off platform. And with fully customizable workflows, policies, users and communication preferences, CLM Pro automates entity data collection and completes key regulatory, legal, KYC and tax requirements.

Throughout the lifecycle, CLM Pro continuously refreshes every record – monitoring for change, collecting additional information, and managing documentation and communication requirements via an intuitive client portal.

And when the time comes, offboard clients using golden records with the assurance that all parties and all systems will be notified and updated.

**Trusted by  
Financial Markets**

Interact with a vast community of existing organizations using an industry preferred platform.

**12,000+  
Customers**

**40,000+  
Active Users**

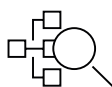
**200,000+  
Legal Entities**

## Benefits to your business



### **Integrate Seamlessly**

Seamlessly integrate with existing internal systems and third-party platforms via a universal set of open APIs.



### **Gain Clarity Across Organizations**

Easily interact and track workflow activity with maximum visibility of progress for all parties across your organization and your clients.

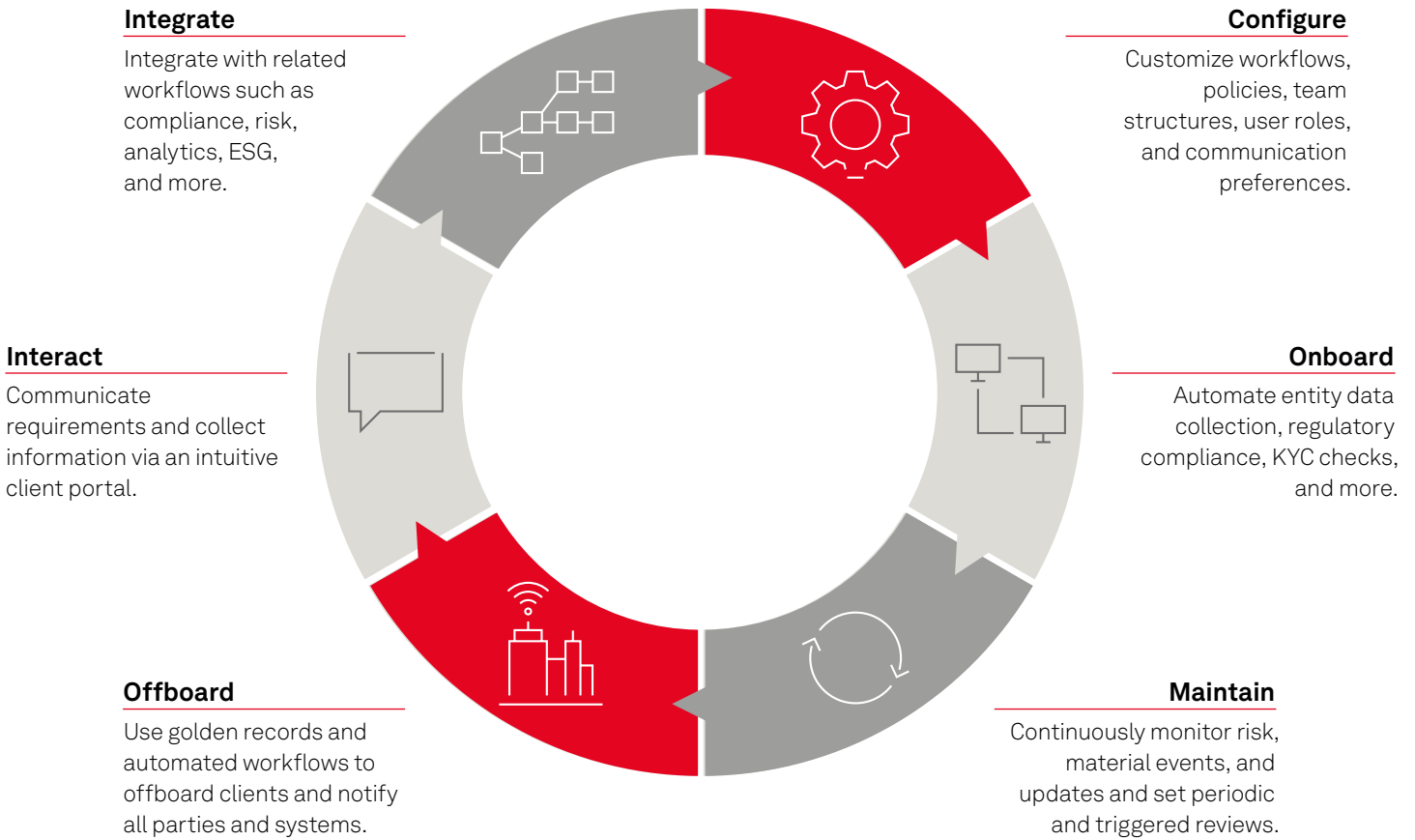


### **Simplify Account Management**

Continuously monitor for change, collect additional information and communicate requirements effectively, via our intuitive client portal.

# End-to-end lifecycle management

Deliver a best-in-class client experience at every step — from contact initiation to account closure.



## Key Features

- Global cloud deployment
- Self-service policy and workflow builder
- KYC, screening, tax and regulatory modules
- Data automation from high-fidelity sources
- Custom risk scoring engine
- Built-in outreach and client portal
- Extensive third-party integrations, including ISDA Create, FXall, DTCC ALERT® and more
- Golden record entity data and document aggregation
- Integration with S&P Global solutions for sustainability, markets, loans, investor intelligence, and credit and risk
- AI-driven Agreement Intelligence
- Document digitization for legal, KYC, tax and more
- Tech-enabled advisory and managed implementation
- Industry policy benchmarks

### See CLM Pro in action

[Request a demo >](#)

### Explore CLM Pro

[spglobal.com/clmpro](https://spglobal.com/clmpro)

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