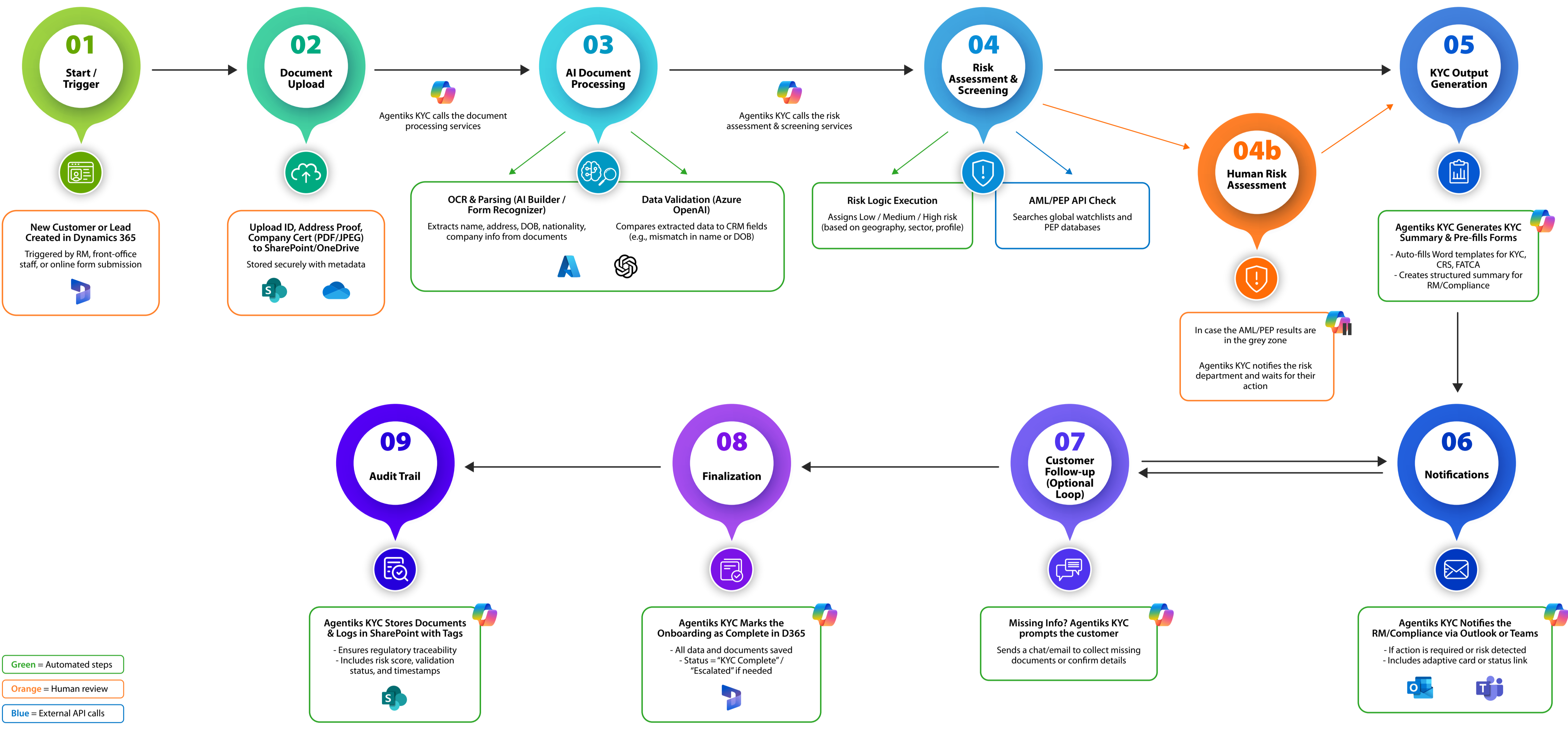


# REVOLUTIONIZE CLIENT ONBOARDING WITH AGENTIC AI

## OVERVIEW

A powerful agentic AI solution that automates client onboarding and KYC processes using Microsoft Dynamics 365, Copilot Studio Agents, Azure OpenAI, and Power Platform tools. It streamlines document collection, validation, compliance checks, and reporting.

### Client Onboarding & KYC Automation Flow, Powered by Agentic AI

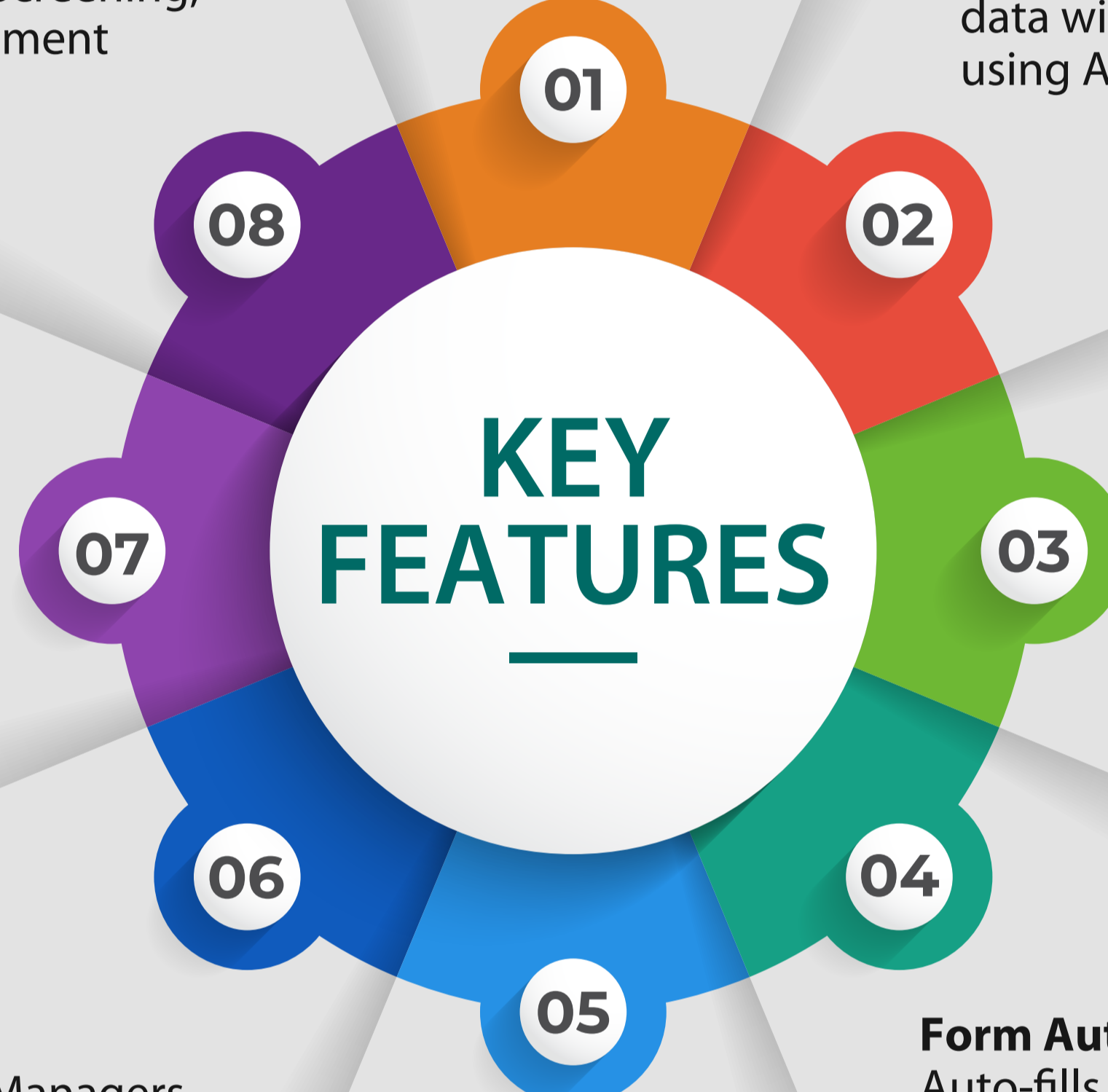


**Deployment Options**  
Ready for integration with On-cloud and On-Premises systems (Core banking, CRM, AML/PEP Screening, Document Signing, Document Repositories)

**AI-Powered Document Ingestion**  
OCR and parsing of IDs, utility bills, and company certificates

**Data Validation**  
Cross-checks extracted data with CRM records using Azure OpenAI

**Audit Trail**  
Stores documents and logs in SharePoint with metadata for traceability



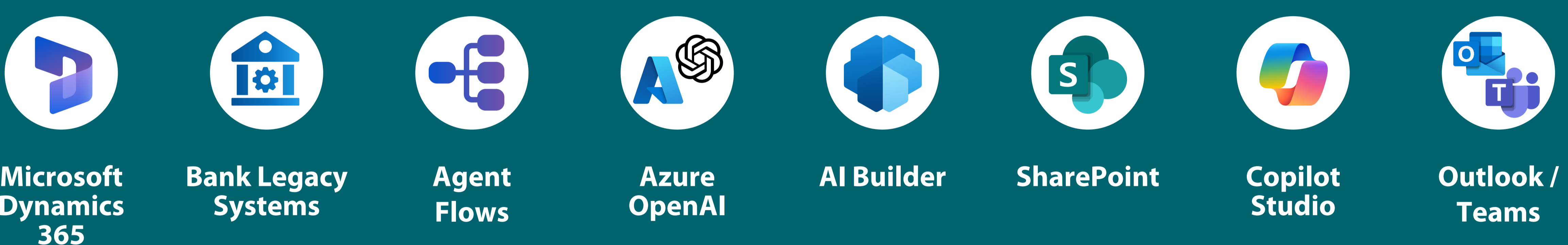
**Risk Classification**  
Assigns onboarding risk levels and performs AML/PEP screening

**Notifications**  
Alerts Relationship Managers and Compliance Officers via Outlook/Teams for human-in-the-loop events

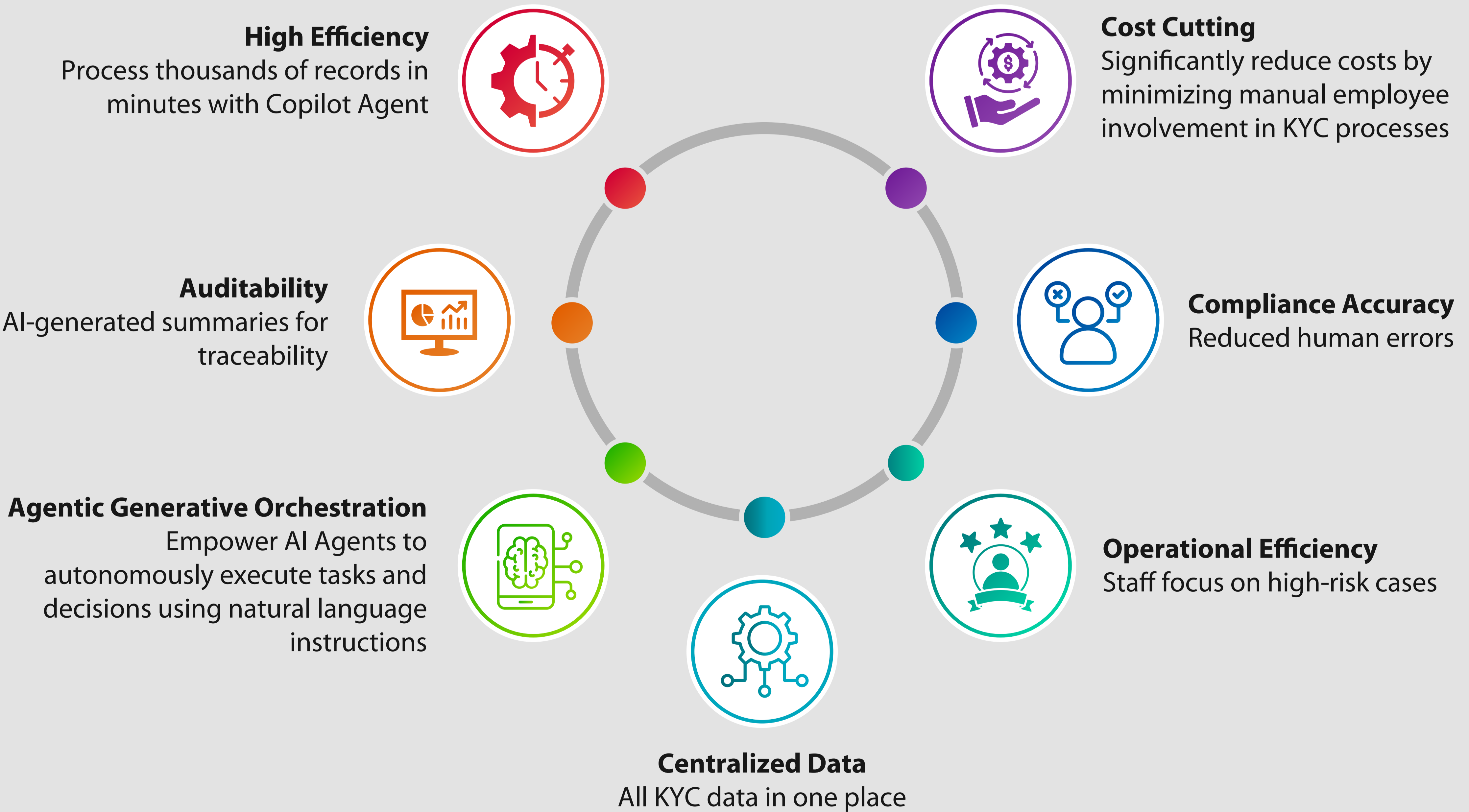
**Agentic Follow-Up**  
Sends automated prompts to customers for missing info

**Form Automation**  
Auto-fills KYC, CRS, and FATCA forms, and generates word document of the KYC Form

## TECHNOLOGY STACK



## BUSINESS BENEFITS



## GET STARTED TODAY

Ready to onboard smarter? Let's talk.