

Type the client in once. Fill every form from the source. Keep every system in step.

The same client data, typed again at every step. Caddi does it once, the same way every time.

2.5

MINUTES PER ACCOUNT
FORM, WAS 17

NEW ACCOUNTS AND ONBOARDING

Onboarding without the re-key chain.

Signed documents are read once. The CRM record and the account paperwork are prepared for signature.

"That 17-minute process is boiled down to two and a half minutes." Salesforce consultant to an RIA

0

FIELDS RETYPED BY HAND

FORMS FROM DOCUMENTS

Source document in, finished form out.

Details come off the statement or agreement and onto the right form for each fund or transfer. Your team checks the exceptions.

"5 or 6 people... all day, every day, just completing forms." Operations leader, RIA, before Caddi

6 a.m.

SYSTEMS IN STEP BEFORE
THE TEAM LOGS IN

SYNC AND FILING

Every system agrees. Every file in its place.

Changes post across the CRM and portfolio systems on a schedule. Mismatches are flagged; every file lands in the right folder.

"It ran this morning at 6 a.m. It's working great." Client service operations manager, RIA

"I can think of any process I want... I can just speak it into existence."

DIGITAL WORKFORCE LEAD, RIA



Start with one.

A pilot on your own systems.
trycaddi.com/schedule-demo