CLOCKWORK®

New Client Journey

Private Investment Platform

clockwork.app

UNDERSTANDING OF NEEDS

During our initial call, we will establish expectations and review your current portfolio setup. Our Client Success team will collaborate with you to design the best way to utilize the Clockwork Universe platform for your specific needs.

PROPOSAL AND CONTRACT AGREEMENT

After finalizing the initial setup and adjustments, we will present a detailed proposal tailored to client needs. Once approved, we will move forward with the contract agreement.

COLLECTING PORTFOLIO DATA

Our Client Success team will provide an onboarding template and can obtain access to your existing systems (email, portals, doc repositories) to gather necessary investment data toward setting up your investment portfolios in the platform. We ensure all data handling is secure and confidential, protected by an NDA.

REVIEW WITH THE CLIENT (~1 WEEK AFTER RECEIVING PORTFOLIO DATA)

After receiving client's initial investment data, we will schedule a call to review the initial setup within our platform. This session allows us to make any necessary adjustments and set expectations for the level of service or support to expect moving forward.

INTRODUCTION TO THE INVESTMENT SOLUTIONS TEAM

In cases where Clockwork will be providing a higher level of service beyond the use of just the Clockwork Universe platform, you will be introduced to our Investment Solutions Team. This team will be your primary point of contact for ongoing support to ensure the relationship is managed in line with your goals.

ONGOING SUPPORT AND FOLLOW-UP CALLS

We believe in proactive communication. Ongoing calls will be scheduled to ensure your satisfaction and to address any evolving needs. Our team will be available to provide continuous support and optimize your experience with the platform and relationship overall.