BNY MELLON | PERSHING

CASE STUDY

APIs Streamline Account Opening

Challenge

When this national RIA firm with over 20 client advisors and a centralized operations team selected Pershing as their new custodian, their two biggest technology priorities were making Salesforce their central repository of data for the operations team and advisors, and streamlining account opening.

Solution

Pershing's Technology Consulting team worked closely with the Business Development team to understand the client's business model and technology requirements. We then introduced in a third-party vendor to help with the mapping and development expertise. The client engaged the third-party vendor, and Pershing's Technology Consulting team worked as a liaison between the vendor and Pershing NetXServices and Implementation teams.

Thanks to this collaborative approach, the client was able to leverage Pershing APIs to create a new account opening process that started in their CRM and leverage Pershing Standard Files to populate all CRM data fields. **Our collaboration empowered this client to define, execute, and implement the experience they were looking to provide to their team.**

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