doxim ®

Doxim CCM for Wealth Management

Regulated Communications from an Expert Service Provider

Strengthen Investor Engagement and Fortify Your Business

Strong relationships are essential for the health and longevity of your business – sustaining them over time and spanning multiple generations is critically important. Your regulated communications are a key touchpoint with clients and an excellent opportunity to strengthen and nurture those relationships.

By partnering with Doxim, you can join the hundreds of financial services companies who trust us to manage their regulated client communications and leverage them to drive better engagement while lowering costs.

Our resilient network of nationwide operations and in-house expertise provide the scale, support and services you need to reduce costs, execute on digital strategies, and engage clients in ways that are personalized, interactive, and can promote relevant cross-sell opportunities. In addition, our Doxim CCM Admin Portal gives your staff a window into Doxim operations, providing insights and reporting, and giving you control over key aspects of your communications across touchpoints.

Whether print or digital engagement, we've got you covered! We're your single, expert partner for omnichannel regulated communications – today and tomorrow.

Omnichannel, end-to-end software and services that empower you to maximize engagement across touchpoints – whether print or digital.

Supporting the Investor Communications Lifecycle

Client Onboarding

Welcome Packages

Monthly, Quarterly, Annual Statement

Year End Tax

From client onboarding to ongoing servicing

doxim®CCM

Best-in-Class Regulated Communications

Focus on Growing Your Business

Let Doxim experts handle the complexity of your document design, production, storage, and delivery – so you can focus on growing and fortifying your business.

Reduce and Manage Costs

We can help you reduce costs by moving as many clients as possible to electronic delivery of client communications, and by taking advantage of single sourcing more of your CCM ecosystem to one integrated platform. Digital communications are a convenient way for today's connected clients to check their accounts and do business anywhere, 24/7, in addition to supporting your ESG initiatives.

Maximize Engagement and Drive Revenue

Choose from a variety of interactive and engaging formats and delivery channels. Incorporate 1:1 marketing message directly on your client statements to drive interest in additional services or programs, turning your regulated communications into a vehicle for increased client engagement and revenue.

Choose an Expert Partner

From digitizing the account opening and client onboarding process, to the delivery of personalized welcome packages, to regulatory customer communications – you can trust Doxim to deliver omnichannel solutions that optimize client experience and reduce cost.
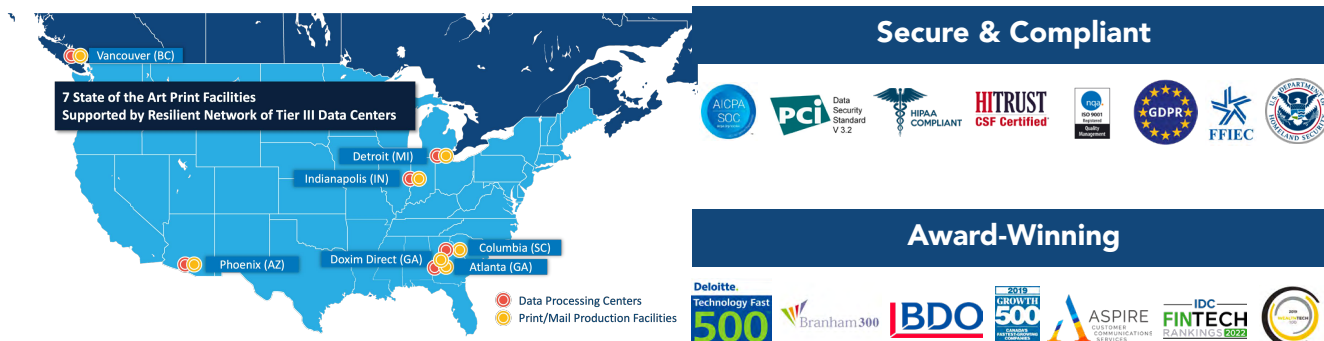
Why Choose Doxim?

There are many vendors you could choose to partner with for a Customer Communications Management solution. Why choose us?

Industry Focus

Your clients value communications like account statements, reports, and trade confirmations, and they expect them to be clear, easy to review, and available through their preferred channel at their convenience.

Years of experience in transactional document processing and delivery have allowed Doxim to gain a deep understanding of the imperatives surrounding print and electronic customer communication delivery and optimization.

Our teams have deep experience with the unique needs you face, relevant regulatory requirements, as well as best practices – it's all we do at Doxim. Leverage our knowledge and expertise to guide you as your business continues to evolve.

Project Management

We provide a full scale, end-to-end implementation methodology that ensures all projects will be transitioned on time, on budget, and with no disruption of service. Our methodology defines business needs at the beginning of the project and we maintain visibility throughout. Our timelines are backed by experienced developers, Certified Project Managers (PMP), and dedicated resources.

Source System Expertise

We have experience providing custom solutions based on your source system data. Our team is well-versed working with a variety of portfolio management and record keeping systems and provides the dedicated focus you require for success.

Print & Mail Excellence

Our fully controlled and robust production environment delivers print & mail excellence you can rely on. Doxim's full color inkjet and roll-to-sheet printing, as well as intelligent insertion technologies, manage the production requirements of all statements and customer communications with industry-leading quality.

Based on our scale, Doxim qualifies as a USPS-designated full-service mailer, enabling us to provide the lowest possible rates and valuable services including address validation and standardization, streamlined mail entry, outbound and inbound tracking, and reporting and secure destruction.

Digital Delivery

Our omnichannel platform lets you switch customers to digital seamlessly and easily – providing a modern client experience while lowering your costs. Securely deliver digital documents (PDF, HTML, video) by email, text/SMS, IVR or via portal. Send digital account notifications by email or text/SMS for near-real time engagement related to account activity. Access delivery and engagement reports to confirm receipt.

Data Security & Compliance

Don't leave privacy, security, and compliance to chance. Doxim operates state-of-the-art, fully compliant data centers and production facilities across North America with processes in place to control risks associated with business-critical communications production, storage, and delivery. Our scale and reach allow us to enable your business continuity even in the most challenging times.

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Doxim is the customer communications management and engagement technology leader serving highly regulated markets, including financial services, utilities and healthcare. We provide omnichannel communications and payment solutions that maximize customer engagement and revenue, while reducing costs. Our software and technology-enabled managed services address key digitization, operational efficiency, and customer experience challenges through a suite of plug-and-play, integrated, SaaS software and technology solutions. Learn more at www.doxim.com.

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