

## Trilogy Capital shapes the future of wealth management with DocuSign

Trilogy Capital is ready for the largest generational transfer of wealth in the history of the United States. As baby boomers pass along an estimated \$30 trillion over the next several decades, Trilogy recognizes that the younger generations poised to inherit that money will have vastly different expectations of their wealth managers.

Johnny Lambert, Trilogy's Director of IT, leads the company's transformation to cater to this new generation.

"We're becoming more of a fintech company, rather than just a financial services company," Lambert says. "Millenials want accessibility, availability, and ease of use. We're dedicating a lot of resources to that."

In an industry notorious for paperwork and compliance forms, Trilogy knew its agreement processes needed to be a key part of the company's digital transformation. The company chose the DocuSign Agreement Cloud and its seamless integration into the Salesforce Financial Cloud to help prepare its business for the future.

### Eliminating paperwork—but not the paper trail

Trilogy Capital's customer experience did not always match its innovative investment approach. In fact, before implementing DocuSign eSignature, Trilogy administrators manually prepared all onboarding and compliance documents and mailed them to clients for signature. That often resulted in weeks or months of back and forth to get the signed documents back.

"We would have to follow up three or four days later to make sure the document arrived, and again two weeks later to ask if the client signed and returned it," says Lambert. "That was a pain and, obviously, that's not the way to do business anymore."

Once those onboarding documents were signed and returned, an administrator would manually enter the data into Trilogy's various backend systems. This manual process created up to a two-week lag between receiving signed paperwork and officially onboarding a new client. The result? A slow process that could jeopardize data and new client sales.

## Results

Before  
DocuSign

**2 weeks**  
to complete  
client onboarding  
paperwork

After  
DocuSign

**2 days**  
to onboard  
new clients

**"We can close deals faster, and our clients aren't losing that time in market growth either."**

**Johnny Lambert**  
Director of IT  
Trilogy Financial and Trilogy Capital

## A mutually beneficial solution for Trilogy and its clients

With Salesforce and DocuSign, Trilogy has cut onboarding time from two weeks to two days. Onboarding and compliance forms are prepared automatically in DocuSign eSignature using client data from Salesforce records. And once an administrator reviews the digital agreements, they are sent out for electronic signature and signed anywhere on any device. That translates to gains for both Trilogy and its clients.

“We can close deals faster, and our clients aren’t losing that time in market growth either,” Lambert says.

Trilogy also sends compliance documents, including Form ADV, to clients for electronic signature and can more easily track their statuses to maintain an audit trail and to ensure compliance.

## Automated account setup

Once clients e-sign digital onboarding and compliance agreements, multiple processes are triggered to ensure efficient account setup for new clients. For example, Trilogy’s processing department receives a notification, and new accounts are created in Salesforce. Other onboarding processes, while not completely automated, are initiated by an automatic notification to the person responsible for taking action on the new account.

“DocuSign has infinitely sped up the period between a new client implementation phase and that person becoming a full-fledged client,” Lambert says.

## Trilogy seizes an opportunity

The impending wealth transfer presents an opportunity for wealth managers – but there is also risk. **66 percent of children** will fire their parents’ wealth manager. With Salesforce, DocuSign, and a fully digital client experience in place, Trilogy is prepared to serve a new generation of clients – and to turn that risk into reward.

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### About DocuSign

DocuSign helps organizations connect and automate how they prepare, sign, act on, and manage agreements. As part of the DocuSign Agreement Cloud, DocuSign offers eSignature: the world’s #1 way to sign electronically on practically any device, from almost anywhere, at any time. Today, more than 537,000 customers and hundreds of millions of users in over 180 countries use DocuSign to accelerate the process of doing business and to simplify people’s lives.

**DocuSign, Inc.**  
221 Main Street, Suite 1550  
San Francisco, CA 94105

[docusign.com](https://www.docusign.com)

**For more information**  
[sales@docusign.com](mailto:sales@docusign.com)  
+1-877-720-2040