



FOR IMMEDIATE RELEASE:

Celent Recognizes Harvest as an “Up and Coming” Leader in Digital Onboarding Solutions

SAN FRANCISCO, CA; June 15, 2020 — Harvest, the leading provider of integrated savings and wealth solutions for the financial industry, announced that it has been recognized as an “Up and Coming” provider by leading industry analyst firm Celent in the report, “Wealth Management Client Onboarding Platforms” which profiles Harvest’s Jumpstart digital account opening product.

A pioneer in digital wealth management solutions, Harvest created the white-labeled solution to address critical pain points of the wealth and trust client onboarding process. By reimagining the experience, Harvest digitized the account opening process, enabling bank wealth and trust managers to eliminate paper and remotely onboard clients across their full product suite.

Since Harvest’s launch of Jumpstart in early 2019, more than a dozen bank and trust firms have signed on to accelerate client onboarding, achieve operational efficiencies, and reduce prospect attrition. Another dozen banks and trust firms are expected to select Jumpstart by year-end.

In addition to freeing up time for advisors and operations staff, the secure digital solution enables wealth managers to onboard clients remotely, which in today’s COVID-19 climate has risen to the top of priorities across all financial services.

“With client access to branch locations restricted, social distancing measures are driving the need for tools such as paperless document management, digital signature, and audit trail functionalities,” said Awaad Aamir, Wealth Management Analyst, Celent and report co-author.

Jumpstart’s simple advisor-led or customer-led user experience simplifies and automates complex enrollment workflows by using flexible data collection and approval workflows as well as e-signature integration. To date, it is the only solution in-market that can open trust accounts digitally.

“We are honored for the recognition from Celent,” said Drew Sievers, Harvest’s CEO. “We’ve worked very hard to build a modern digital technology to reimagine the experience for bank and wealth managers and are pleased to offer an RIA-like modern solution that addresses their specific needs.”

Celent clients with a research subscription can download the Wealth Management Client Onboarding Platforms report [here](#).

ABOUT CELENT – Celent is a research and advisory firm dedicated to helping financial institutions formulate comprehensive business and technology strategies. Celent publishes reports identifying trends and best practices in financial services technology and conducts consulting engagements for financial institutions looking to use technology to enhance existing business processes or launch new business strategies. With a team of internationally experienced analysts, Celent is uniquely positioned to offer strategic advice and market insights on a global basis. Celent is a member of Oliver Wyman Group, which is a wholly-owned operating unit of Marsh & McLennan Companies [NYSE: MMC]. www.celent.com

ABOUT HARVEST SAVINGS & WEALTH TECHNOLOGIES – Harvest Savings & Wealth Technologies delivers integrated, enterprise-grade digital savings and investment technology to banks, credit unions, trust companies, and other financial institutions. The firm's technology was architected and engineered to deliver cutting edge, end-to-end digital solutions that unify and automate a bank's savings, wealth and trust solutions. Harvest supports multiple custodial and trust systems. Harvest is a technology company and has no direct-to-consumer digital advisory offering. For more information, visit www.harvestsw.com.

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