On-boarding overview
Key stages

Initial meeting → 2 weeks* → 2 weeks* → 4 weeks* → 2 weeks* → Projected go live

* Timelines may vary depending on individual set-up of clearing accounts, CCP access and KYC requirements

Kick off meeting and Information Gathering	– Key stakeholders are identified – Operational and coverage requirements are outlined
Business requirements (Termsheet)	– Termsheet is drafted and discussed – Agreement is reached
Legal & CCP Documentation	– Legal documentation is drafted to include commercial provisions agreed in the termsheet – CCP documentation is completed
Operational Set-up	– Affirmation platform set-up, DB internal set-up and reporting set-up – Completion of operational set-up will be completed upon obtaining the CCP account number
Workshops / Training and relevant flow tests	– Provide and facilitate any relevant system demos (e.g. Client portal for accessing reports) – Conduct any flow tests as required
Coverage team introduction	– Hand-off meeting is arranged to introduce daily coverage contacts
Client go-live	– Transition team and Client Service will fully support client for successful launch