

Kia Ora there,

Wow - just like that February is done! As we move into 2022, this update has some useful information to help you reflect and refocus on your goals for this year.

- Renew and grow (using the renewals process to get the most from client engagements)
- AML Ongoing Customer Due Diligence (watch our Webinar video)
- Getting your Privacy Policy sorted



Renewals to get the most from engagements

Renewals Grow Value

The new year is a time for growth and renewal. In the same way you do in the vegetable garden, you should 'plant the seeds' each year to get growth in your business.

Read our blog explaining a simple but effective way to evaluate clients and focus on the actions to grow your business. The 2Shakes renewal process makes sure you can formally lock in the value to your clients, and make 2022 a fantastic year for your business.

[Read more about how to use renewals to grow your business](#)

AML Ongoing Customer Due Diligence Webinar

We ran a webinar on how to do Ongoing CDD that covered:

- What is OCDD and why do it?
- What triggers Ongoing CDD?

- ID Verification guidance changes, and Biometrics
- Changes to Beneficial Owners
- Steps for Ongoing CDD in 2Shakes for AML Only
- Steps for Ongoing CDD in 2Shakes for Renewals and AML

[Watch a recording of the webinar](#)

Getting Privacy Sorted

Are you also the Privacy Officer? The new year is a good time to review your privacy policy and make sure it's up to date. 2Shakes have our updated [Privacy Policy here](#).

Remember that NZ's Privacy Act changed, so make sure your Policy refers to and meets the Privacy Act 2020! So we have some useful information to help you [get your own privacy policy sorted](#) on our website.



2Tips

- **Free 2Shakes Training environment**
2Shakes offers you your own play pen training version of the software. Its fantastic if you want to try out how something works in a safe place.
 - **Have a Training Account?** [Log On now](#)
 - **Need a Training account?** [Sign Up now](#)
- **Free AML Training Videos**
On the 2Shakes website there a lots of [training videos & tutorials related to AML](#). If you watch a video or read an article related to AML then take a moment to record it. It can be as simple as a list on a spreadsheet. Then, so it's easy to find, upload your training log to 2Shakes for storage under AML > AML Documents.

As always, if there's anything we can help with please reach out to the support team at support@2shakes.co.nz or use our [Contact page](#).

Thanks very much for all your support, and hoping everyone has a great 2022!

Ngā mihi nui,
The 2Shakes Team



2Shakes Limited

W: www.2shakes.co.nz

Client Onboarding Automation | AML Due Diligence.

This message, its ideas and any files transmitted with it are sent in confidence and solely for the use of the intended recipient.

If you are not the intended recipient or the person responsible for delivery to the intended recipient, be advised that you have received this message in error and that any use is strictly prohibited. Please contact the sender and delete the message and any attachment from your computer.

2Shakes Limited, Level 4, 85 Ghuznee Street, Te Aro, Wellington, New Zealand 6011

[Unsubscribe](#) [Manage preferences](#)