

Due Diligence Landing Page Template

Structure and copy prompts for financial services due diligence or RFP landing pages.

Page Structure

1. ****Hero Banner**** – Value proposition, regulator credentials, CTA to request full due diligence pack.
2. ****At-a-Glance Metrics**** – AUM, client tenure, capital adequacy ratios, uptime, security certifications.
3. ****Compliance Overview**** – Licences, regulatory regimes, reporting cadence, key policies.
4. ****Risk Management**** – Governance framework, risk committee details, third-party audits.
5. ****Technology & Security**** – Infrastructure outline, data residency, penetration testing highlights.
6. ****Product Fit**** – Solutions matrix mapping investor segments to features.
7. ****Testimonials & Case Snapshots**** – Quotes with compliance-approved context.
8. ****Documentation CTA**** – Gated form to download detailed DDQ, SOC reports, financial statements.
9. ****Contact Module**** – Named relationship manager, calendar link, SLA expectations.

Copy Prompts

- What regulator(s) oversee this product and when were licences acquired?
- How do you segregate client funds and monitor capital adequacy?
- What certifications validate your security posture (ISO, SOC, PCI)?
- Which risk frameworks guide investment or lending decisions?
- What onboarding and training do relationship managers follow?

Assets to Prepare

- PDF DDQ with version control and approval logs.
- SOC2 / ISO certificates with expiry dates.
- Recent audit summaries and compliance letters.
- Information security overview slide deck.
- SLA documentation and escalation contacts.

Governance Tips

- Update metrics quarterly and align with investor relations outputs.
- Embed compliance approval notes in CMS revisions.
- Maintain distribution list showing who has downloaded sensitive documents.