

9 Things to Look for in a Paperless Solutions Provider

- A range of products and solutions **1**
- Wealth-management specific offerings **2**
- Familiarity with SEC and FINRA regulations **3**
- Implementation assistance **4**
- Ongoing customer support **5**
- Integrations with other technology providers **6**
- Integrations with financial institutions **7**
- A willingness to customize offerings **8**
- A track record of success in the wealth management industry **9**
- Bonus Point**
A cloud-based Digital Operations Platform **10**