

PAPERLESS CHECKLIST

9 Things to Look for in a Paperless Solutions Provider

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

*Bonus point