

Client Onboarding Made Easy and Paperless

Create a great client and staff experience, boost your productivity, and save a ton of time by streamlining your new account opening and maintenance paperwork process.

One of the most costly and significant challenges for financial advisors and their team is the time spent on daily administrative tasks such as searching for forms, entering data manually, collecting signatures, and not knowing if forms are filled correctly. Management of new account opening and maintenance paperwork can leave you, your team, and your clients confused and frustrated.

With the Docupace Platform, automating new account opening and maintenance is paperless and fast.

Streamline the way you open, send, and track business and spend more time on what's important—servicing your clients.



Increase Your Team's Efficiency

Any costly errors or incomplete forms are automatically detected, significantly reducing not in good order (NIGO) submissions.



Work Smarter, Not Harder

All the forms necessary for completing a transaction are pre-populated with the latest client information from your CRM or workstation.



Offer a Better Client and Staff Experience

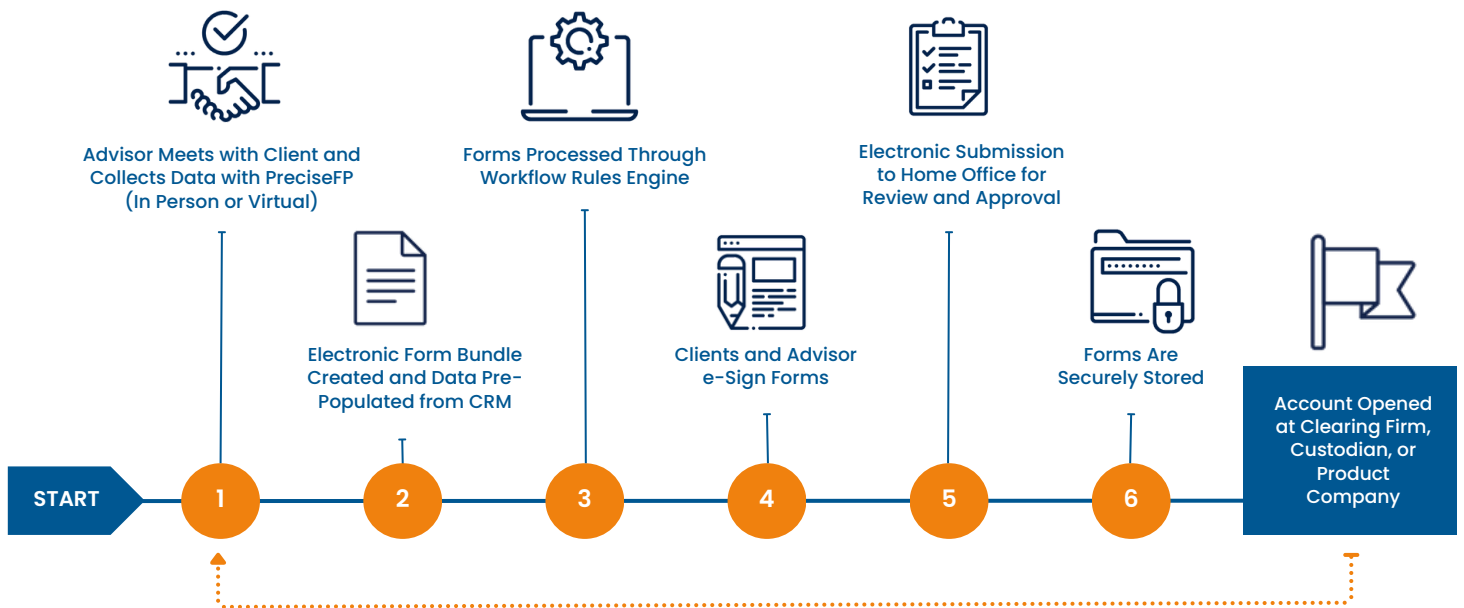
Forms are electronically signed, recorded, processed, confirmed, tracked, and transmitted—all within minutes.

Docupace Takes Your Entire Business Paperless

- **Cloud-Based:** Access all your documents from anywhere, on any device with a modern client onboarding experience.
- **CRM Integration:** Eliminate rekeying of data into forms.
- **Intelligent Forms and e-Signature:** Get the right form, fill them correctly, and sign electronically.
- **Integrated Paperwork Processes and Tracking:** See where business is every step of the way, from submission through the home office.
- **Built-In Compliance:** Reduce NIGO rates with compliance checks throughout the process.

The Digital Path to a Better Client and Staff Experience

Automate and simplify the manual steps in new account opening and maintenance processes



Ready to save time and money while you elevate
your client and staff experience?

Contact your firm for more information

Visit www.docupace.com