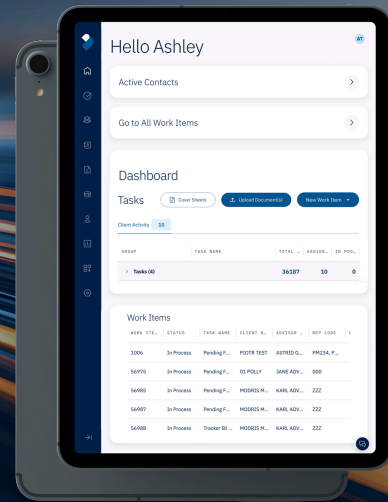


Same Docupace. Big Upgrades.



Docupace is the Wealth Operations Platform. It's a configurable system for the operational jobs at the heart of wealth management: client data gathering, account opening and maintenance, advisor transitions, surveillance and compliance, and compensation.

Docupace Next builds on that foundation. Contacts are stored once and reused across accounts, signatures come together in one packet, and administrators can change more on their own, without a support request.

Nothing You Rely On Gets Left Behind

- Workflows and every step in them
- E-signature, wet signature and document delivery
- Post-processing queues
- Documents and history
- Forms library and Form Favorites
- Reports, firm hierarchy and data roles

Docupace Next keeps the workflows, documents and data your firm runs on, and rebuilds the screens around how your team actually works.

What Docupace Next Does for Your Firm

Capture It Once

Store a person or legal entity once as a Contact and reference it from every account it touches. Update an address once, not in every folder.

Relationships Stored, Not Just Names

Beneficiaries, Trusted Contacts and Authorized Individuals become Contacts of their own, with the relationship type recorded.

Sign Once, Not Once per Work Item

One e-signature packet can span several work items. Your client gets one email and signs once, with fewer abandoned packets.

Guided, Straight-Through Account Opening

Guided data capture for Pershing and NFS on standardized custodial APIs. The data drives the process, with far less rekeying.

Tables That Match How You Work

Add, remove and reorder columns in any table, then save the layout for yourself or publish it firm-wide. No support request needed.

Cleaner Data at the Point of Capture

Optional USPS address validation as data is entered, plus separate records for people and legal entities. Less NIGO, less cleanup.

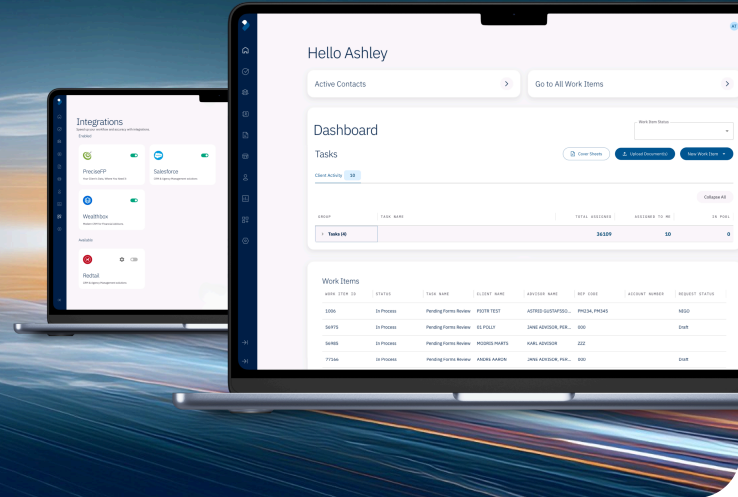
Faster Advisor Adoption

Screens built around how advisors work, so they spend less time in training and more time with clients. The workflows they already know carry forward.

WHAT CHANGES FOR YOU

Same Platform, Rebuilt Around How You Work

The jobs stay the same. What changes is how quickly your team gets them done and how much they can handle without calling support.



TODAY IN CONNECT

Client Parties

Beneficiaries and Authorized Individuals are names held on the Client Folder.

Client Data

The same person is re-created and rekeyed in every folder they appear in.

E-Signature

One signing packet per work item, so the client signs several times.

New Accounts

Form-first entry through custom widgets or a bespoke API for each site.

Table Columns

Column layouts are configured centrally, not by you.

Finding Documents

Browse a flat folder list and remember where each item was filed.

Reports

Every look at the numbers starts with a trip to Open Reports.

Administration

Spread across admin panel screens and edited record by record.

TODAY IN DOCUPACE NEXT

Each party is a Contact of its own, with the relationship stored as data.

Stored once and reused across every account. Update it in one place.

One packet across several work items. One email, one signature.

Guided data capture, straight through to Pershing and NFS.

Firm admins add, reorder and publish layouts for themselves or the firm.

Folders sit under the Contact they belong to. Search still works.

A dashboard of common reports on arrival. Open Reports is still there.

Grouped by users, entitlements, features and integrations.

New Integration Options

Turn on USPS address standardization, search for or create Investnet Households without leaving Docupace, and import CRM contact data as you create a Contact or work item.

Build on a Fully-Featured GraphQL API

A documented GraphQL API for your own and your vendors' integrations. REST stays in place, and Docupace plans and sequences your move onto the new API.

2.8M+

accounts opened each year

17M+

work items processed each year

1.7%

NIGO rate across the platform

655M+

documents stored

[Schedule a Conversation →](#)

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