



# The Choice of Financial Services Firms.

After careful consideration and review, financial services firms choose NetDocuments, the cloud leader in document and email management for 20 years, to help them solve internal productivity challenges while providing tools for better client collaboration and improved security and compliance.



**SECURE & COMPLIANT INFRASTRUCTURE**



**ANYWHERE PRODUCTIVITY**



**CLIENT COLLABORATION**

Ask about the NetDocuments preferred pricing for TD Ameritrade representatives.

## **IMPROVE COLLABORATION AND COMMUNICATION WITH CLIENTS**

Easily share and collaborate on key documents with clients via secure client portals.

## **CONNECT TO POPULAR CUSTOMER RELATIONSHIP MANAGEMENT (CRM) PLATFORMS.**

Integrate directly with Salesforce.com or Redtail CRM via connectors for a seamless embedded experience or use the platform's open API to integrate with most other CRMs.

## **REDUCE TIME SPENT MANAGING EMAIL.**

Quickly file emails to the correct client's workspace with predictive filing that anticipates individual preferences and filing behaviors and eliminates redundant filing on internal email chains.

## **SIMPLIFY COMPLIANCE AND AVOID COSTLY FINES.**

Documented audit trails, activity logs, and robust access controls make it easier for you to meet your compliance requirements and avoid expensive fines. Some of NetDocuments compliance certifications and security attestations include: *FINRA/SEC 17a-204, Write Once Read Many (WORM) functionality, Third-Party Downloader Addendum, SOC 2 Type 2, SOC 2+, HIPAA, document level encryption, ISO 27001, 27017, 27018.*

## **ACCESS CLIENT INFORMATION ON THE GO WITH TRUE MOBILITY.**

With an app for both iOS and Android devices and a file syncing desktop app for offline work, the platform ensures you have access to your client information whenever and wherever you need it.

## **IMPROVE OPERATIONAL EFFICIENCIES WITH OPTICAL CHARACTER RECOGNITION (OCR)**

Allow all your documents to become full-text searchable with the platform's OCR functionality, allowing you to avoid duplicating work and find documents easier.

## **STAY ORGANIZED WITH CLIENT-CENTRIC WORKSPACES.**

Client-centric workspaces allow you to manage your client's documents and information in a single workspace view for each client, sub-folders and client portals.

For more information about how NetDocuments can improve your business contact us:

 1-866-638-3627

 [info@netdocuments.com](mailto:info@netdocuments.com)