

Intelligent Document Management for Financial Services Industry



- Search entire documents or forms with unstructured data
- Enjoy quick and easy forensic level search functionality
- Find files uploaded by individual, departments, date or file type – anywhere and anytime



- Store your data in our private cloud and access files via a secure, encrypted connection
- Benefit from built-in permission levels for confidential information
- Track all changes via our audit reporting



- Upload, search, view, preserve and download your company documents
- Get up and running the first day of installation
- Spread the benefits across many different cross-functional owners within your organization
- Leverage our APIs to integrate into your different systems and workflows

Industry Challenges

Today, the Financial Service industry continues to seek out innovative ways to improve the customer experience and strengthen customer relationships. This becomes extremely important in the competitive environment for both internal needs as well as serving external customers. The need for file sharing, collaboration and online storage that drives results for the industry are essential as more choices are available for customers.

The ability to integrate these requirements into enterprise content and records management systems is paramount. This includes the ability to support a wide range of paper documents that can be scanned, customer files and forms, different transactions types and case management without the burden of adding more costs to the equation. This environment is ever changing as well as the reporting, auditing and compliance requirements, therefore tools need to be secured and easily integrated into existing systems and workflows. The cross collaboration between teams and individuals to respond quickly and efficiently is essential to strengthen the customer relationship.

The InfoPreserve Solution

That's why InfoPreserve has designed an intelligent document management solution that enables:

- **Uploading** digital assets and documents quickly and efficiently for file sharing
- **Searching** and **retrieving** documents with a single view into those digital assets for collaboration
- **Preserving, integrating** and **exporting** documents

At InfoPreserve, we understand it may be difficult to implement a completely new solution, so we've designed one that can be incorporated into your existing systems and processes with ease. It's also flexible enough to grow with your organization over time.

Because our solution is based on a Software as a Service (SaaS) model, which means no upfront capital and information is stored in our secured private cloud, installation is simple and your users will be up and running in less than 24 hours.

Plus, our software comes complete with permission-based logic for your different users, as well as detailed reporting to support risk management and compliance requirements.

You'll have all the tools you need for document review and discovery. Our focus on record and content management aligns with the needs of your ever-expanding and changing role in financial services.

There's nothing more important than your critical data. We promise you'll see immediate value once you select a trusted document management solution from InfoPreserve.

Manage Your Documents in the Cloud

Access Controls • Audit Trails • Retention Management • Content Authentication • Deletion Protection

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