

Finity360™ Forms



Financial services is complex, confusing and it all starts with the application process. Why not deliver an easier, less complex application process to onboard your customers?

That's why we created **Finity360™ Forms** a (NLF) A Natural Language Form is a type of web form that has text input form fields embedded inside of a conversationally styled sentence. This contemporary type of online form tends to be more engaging than traditional forms because of its narrative style. Bundle your documents, add custom rules, allow attachments and integrated with e-signature. Eliminate NIGO's from your firm today.



Create a better user experience for your customers

When it comes to client retention, attention to detail is critical to your success. These devilish details can affect your client service, thereby seriously impacting your reputation as an advisor.

While working through the ever-present pile of mind-numbing applications and supplemental forms, all requesting personal information, you're bound to overlook a checkbox or two. It's unavoidable. After all, as Alexander Pope so famously penned, "to err is human." Unfortunately, every missed checkbox or misspelled name or outdated form ensures a delay. And a delay in an application's approval means an unhappy client, which in turn means potential client attrition.

Paper based applications are too long and confusing to most clients.

Finity360 Forms improves the document process by using (NLF) Natural Language Form to guide customers through an online process. Designed to be less intimidating, reducing repetitive information and eliminating missing data and allowing for electronic signature for a completed document.

Exact requirements for your business

With a multitude of products or services your firm offers, Finity360 Forms was built with flexibility to meet your exact business requirements.

Our form flows are designed to allow for customized rules, attaching artifacts that maybe required. It can even allow for collaboration of data between joint parties and distributing household info as required.

Completely platform independent. Finity360 Forms can reside on our Salesforce Finity360 Portal or can be integrated to your own web-based portal.

Key Benefits

- ▶ Makes a better customer onboarding experience.
- ▶ Supports all registration types.
- ▶ Completely eliminate NIGO's
- ▶ Integrates to US Postal Service CASS-certified address hygiene and correction systems.
- ▶ Integrates fully with Salesforce, custodians, LASER APP and other 3rd party systems.
- ▶ Ability to track, manage and report on application status.
- ▶ Integrated business rules engine to validate account details and supports attachments as required.



Digital ready with E-Signature integration

Electronic signatures prevent unnecessary delays from posting the documents to other parties. Also, it is a secure way to sign documents because traditional signatures can be forged or copied.

Electronic signature reduces the time required in obtaining signed documents. Traditionally signed documents process takes five to six days, but on the other hand, E-sign takes five to six minutes to receive signed documents. It is a stress-free sign process and sends reminders to signers.

Finity360 Forms supports both Signix and DocuSign API's in our NLF process flows.

Now it's time to quit your traditional ink pen signature method. With the electronic signature, you can sign your papers online. It cuts down turnaround time by more than 80%. E-signature send online documents even before the ink has dried on page

Compliance ready

Finity360 Forms maintains your process according to your firms Written supervisory procedures.

- ▶ SEC, FINRA and Patriot Act support, including integrations to real-time identity checks and scores.
- ▶ Preserve documents in our own Finity360 DOCS for 17a-3, a-4 or your own worm solution.

Finity360 can adapt quickly to changing regulations and business requirements.

Features at a Glance

- ▶ Dramatically reduces client onboarding time with reduced NIGO rate
- ▶ Supports house holding and joint account opening processes with end investors.
- ▶ Supports both electronic signature and traditional print and mail process.
- ▶ Track and manage the document process with email notifications and alerts.
- ▶ Completely platform independent. Finity360 Forms can reside on our Salesforce Finity360 Portal or can be integrated to your own web-based portal.



About Finity360

Finity360, an innovation of Arcus Inc., is a suite of cloud-based document and data management solutions that gives financial institutions the agility, scale and security they need to gain maximum business value from their traditional documents, digital assets, and operational workflows.

Based on more than 30 years of experience in capital markets, securities back-office operations, data aggregation and system integration, Finity360 helps capital markets and other financial services organizations modernize their operations and revenue models by eliminating technology, process, data and regulatory challenges.

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