



## Digital Writing Solution

- IMPROVE ACCURACY
- RELIABILITY
- ACCOUNTABILITY

Financial advisors need to manage more information and the related documents and forms associated with doing business. Having a solution that helps them capture client data and execute the documentation process in real-time would increase theirs and their company's overall proficiency exponentially.



### PointDigital Digital Writing Solution

PointDigital© – Digital writing solution is the fastest and easiest way to turn your field operations into a highly efficient digital solution that allows you to communicate and collect in real-time the critical data and documents you need to move business through your workflow processes.



### SOLUTION OVERVIEW

PointDigital© digital writing solution allows your mobile workers to write on a form and capture electronically whatever is written, including signatures. Data from the pen is sent via a Bluetooth - enabled device or docked with a PC and downloaded to the server where the handwriting is converted into electronic text. A PDF image of the form and all handwriting is available within seconds for viewing. Digital writing is a convenient, natural way to collect information with minimal change to your current business processes or user-adoption issues

- REAL-TIME ACCESS TO DATA AND DOCUMENT
- IMPROVES BUSINESS WORKFLOW PROCESSES
- LOWERS OPERATING COST ON MULTIPLE BUSINESS LEVELS
- ACCOUNTABILITY FOR AUDITS AND COMPLIANCE

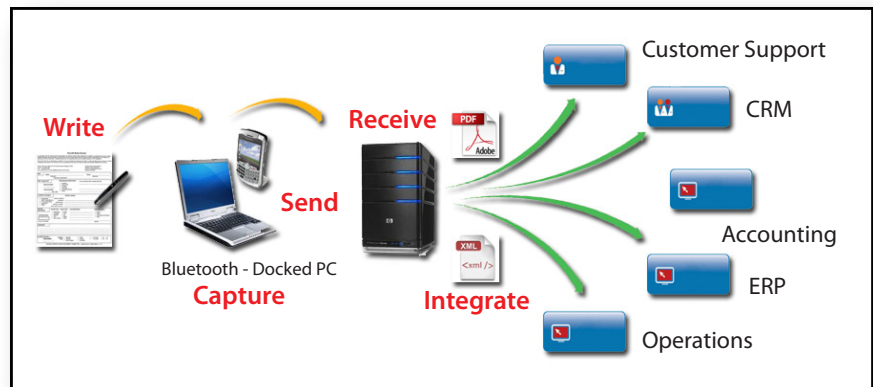


## Digital Writing Solution

From money management, wealth management and banking to personal investments and venture capital PointDigital© allows you to unobtrusively capture data and documents efficiently and process this information in real-time.



### Business Workflow Sample



PointDigital© can be integrated with any application that accepts data in XML or TEXT and images in PDF, JPG or TIF formats.

Original image (PDF) of the handwritten document and signature is automatically generated electronically, eliminating the need for long-term storage of paper documents.

Encrypted data throughout the transmission process protects valuable information.

Date and timestamp is created for all entries on the form providing a clear audit trail to help with regulatory compliance.

### Industry Related Forms

- Authorization Forms
- Disclosure Statements
- Stock Power of Attorney
- Dividend Tax Exemptions
- Indemnity Agreements
- Informal Trust Agreements
- Account Enrollment Applications
- Account Closing Forms
- Checking and Debit Applications
- Direct-Deposit Enrollment Forms
- Automatic Payment Change Request
- Transaction Search Forms

For more information and an onsite demonstration contact