AUTOMATING FINANCIAL FORMS

Laser App

Laser App is a **leading financial forms automation solution** that streamlines the process by pre-populating clients' information and managing documents directly from your CRM. With more than **70 integrations** and **33,000 forms** in the library, this solution offers financial firms with the largest selection of forms for advisors.

Whether you're using third-party solutions, a proprietary workflow, or a decentralized strategy of technology, Laser App incorporates client data across all platforms to streamline the order entry process for various transactions, including, securities, annuities, life insurance, and custodian.
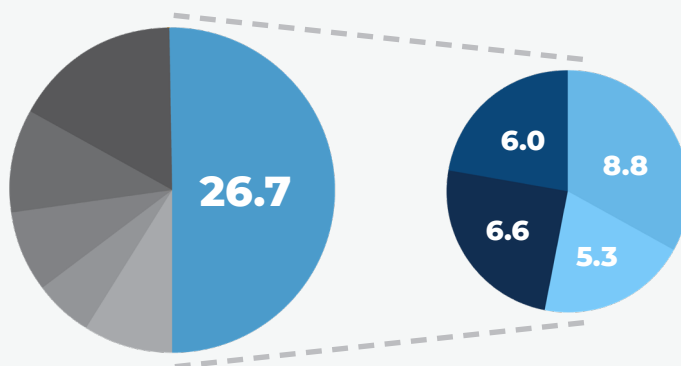
How Can Laser App Help You?

REDUCES DATA ENTRY FOR FASTER PROCESSING

Did you know that advisors spend an average of **26.7 hours** on administrative and back-office tasks? This accounts for more than 50% of a typical **53-hour** advisor work week.* By leveraging the latest technology to digitize back-office processes, Laser App makes submitting and processing financial forms easy for the advisor, as well as the home office. This results in reducing cycle times and increasing profits for the advisor and firm, while making the process quicker and easier for the client.

HOURS SPENT BY THE TYPICAL FINANCIAL ADVISOR ACROSS VARIOUS WEEKLY TASKS

- Direct Client Activity
- Back-Office Client Related Tasks and Client-Facing Tasks

26.7

6.0 8.8
6.6 5.3

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CONSOLIDATE YOUR USER EXPERIENCE FOR EASY ADOPTION

The days of needing to access numerous websites and multiple platforms to write business are over. Laser App has a built-in e-App process for annuities and life insurance, integrates with the leading clearing and custodian platforms, and houses more than 33,000 industry forms - all in a centralized library. Advisors can also add their own proprietary forms, making Laser App the single most all-inclusive solution for your full-service needs.

GET UP AND RUNNING QUICKLY, FOR FASTER DEPLOYMENT

Laser App is specifically built for the financial services industry. Accounts are set up within one business day and proprietary forms can be programmed to receive data within just eight business days.

Using one-time standard data mapping and ongoing standardization of rules ensures that applications cannot be submitted with incorrect or insufficient data, which provides an expedited sales process and shorter cycle time.

INTEGRATE WITH THE BEST SOLUTIONS

We've built integrations with the leading CRM, workflow, and e-Signature platforms which eliminate the need for any custom development work or excess costs.

30+ CRMs: including Salesforce, Redtail Technology, and Wealthbox CRM

e-Signature: AlphaTrust®, DocuSign, SIGNiX, OneSpan, and Adobe Sign

Get more value with: iGO® and AFFIRM®

FOCUS ON YOUR CLIENTS, NOT THE PAPERWORK

Laser App's forms automation feature allows registered investment advisors (RIAs), agents, and brokers to streamline the process of completing clients' forms, supporting efficiency and consistency, and managing documents.

31%
increase in profit margins*

95%
repeat clients

94%
user adoption

FLEXIBLE IMPLEMENTATIONS THAT MEET YOUR CHANGING NEEDS

Laser App offers flexible and accessible deployment styles to match your needs. You can use it anytime, anywhere, on any device. Whether you are an independent broker-dealer whose representatives use countless CRMs or a broker-dealer that controls the entire customer experience within a portal, Laser App has a solution that meets your needs.

PROTECTS YOUR DATA WITH THE HIGHEST SECURITY STANDARDS

Laser App provides full end-to-end encryption to ensure the privacy of your clients' data while complying with the most stringent regulatory requirements in the financial services industry. All sensitive data is segregated with access control rules at the network and application levels, in line with industry security best practices. Private data is encrypted using Advanced Encryption Standard (AES) encryption and securely replicated at regular intervals across our two AWS cloud platforms.

These are average numbers and are not indicative of definite future results.

Library of **33,000** forms

Used by **100,000** Advisors, Agents, and Brokers

Reduce the time for data entry by up to **80%***

200+ Fields Prefilled directly from your CRM

30+ Pre-Built CRM Integrations

95% Repeat Clients

SCHEDULE A DEMO

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