



# Tru Independence Invests In **Foxit PDF Editor** To Help Wealth Management Firm Clients



CASE STUDY

## Overview

- **Region/Country:** Portland, Oregon, USA
- **Industry:** Financial Services
- **Company Size:** 25-50
- **Competitor:** Adobe Acrobat
- **Foxit Product:** Foxit PDF Editor
- **Key Features:** Cost-effective licensing model, full-featured PDF editing, easy form creation, OCR capabilities for creating searchable PDFs, and superior customer support
- **Integrations:** Microsoft Office and DocuSign



### The Challenge:

When working with PDF files, Tru used outdated versions of Acrobat Pro 9 installed locally across their user base. This created a struggle for application standardization ***"We knew we needed to come up with a different option that would satisfy all of our clients,"*** adds Dalton. ***"Pretty much every person in every office is a power user, so they all need full PDF editing capabilities. A reader just wouldn't cut it."***

### The Solution:

As Tru evaluated different vendors, they eliminated Acrobat because Adobe's licensing would have meant a 500% increase in cost, which was prohibitive. They also looked at Nitro PDF, Soda PDF, and others, but they were all quickly eliminated for one reason or another, whether it be missing features, insufficient data security, or licensing issues. Then they reviewed Foxit PDF Editor and things began to fall into place. ***"Foxit gave us a licensing model that worked and was all within budget,"*** Dalton explains. ***"It's a flexible model. If Client A leaves and we recover five licenses, we can assign them to Client B."*** Yet while licensing was paramount, it was the full-featured editing capabilities that Foxit PDF Editor offers that really won over the Tru team.

## Results

### | Familiar Look And Feel

The ribbon interface in Foxit PDF Editor meant Tru users immediately felt at home with its familiar, Microsoft Office-style look. ***"Our users' feedback is that the interface is so much easier than Acrobat,"*** adds Dalton. ***"It meant we could roll out without a ton of training."***

### | Ease Of Creating Forms

Form creation in Acrobat had required Tru's support team to assist users at every level in the company. ***"Our chief compliance officer did not have the easiest time making forms in Acrobat,"*** Dalton explains. ***"So when she came to me after trying Foxit PDF Editor and said 'Hey, this is awesome. I can do this without having to call you,' that was huge."***

### | World-Class Support

Foxit is well-known for responsive technical support among its customers, who give them high marks, time and time again. Tru Independence is no exception. ***"We haven't had to lean on Foxit support a lot but when we do, they've been great,"*** says Dalton. ***"With Adobe, it was more like 'get in line and we'll get to you when we get to you.'"***

### | Strong Integration

Integrating with the software stack used by the client base was a key factor in convincing Tru to adopt Foxit PDF Editor. ***"We were pretty excited to see DocuSign and Microsoft Office integration,"*** Dalton comments. ***"That's paving the way for some important future initiatives."***



## Streamlining New Account Creation Increases Customer Satisfaction

As Tru advances its digital initiative, they plan to use Foxit PDF Editor to help digitize paper-based business processes. ***“Opening new accounts is still a manual activity,”*** adds Dalton.

***“Clients fill out paper documents, scan them, upload them to DocuSign, then send them to their clients. We’re excited to go straight from an electronic document through DocuSign with Foxit PDF Editor to get documents out the door faster.”***

## Staying In Compliance Every Step Of The Way

Adding, deleting, moving and reusing pages may seem rudimentary but it’s a feature set that Tru clients use heavily. They need to create these documents easily and know that they’re secure.

***“Our users combine pages from different documents to create new documents hundreds of times a day,”*** as Dalton says. ***“Because we’re under regulatory oversight by SEC and FINRA, lots of attention is paid to accuracy and data security. We rely on Foxit’s advanced tools not only to create documents quickly but also to share them securely.”***

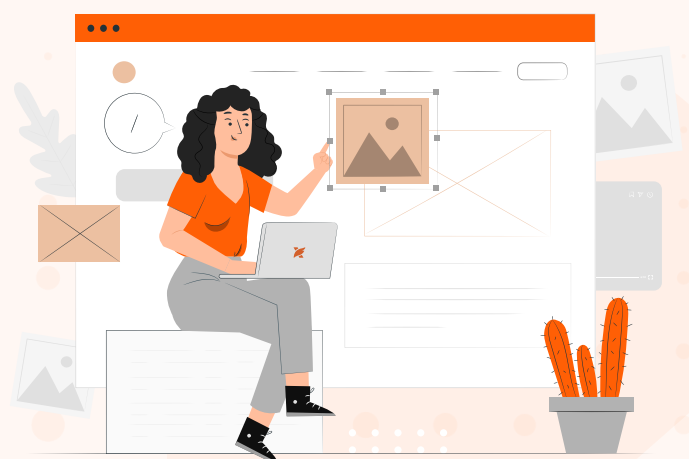
## Finding Information Quickly Speeds Up Workflow

As Tru clients perform OCR on the large quantity of paper documents that come back to them, using Foxit PDF Editor, they’re immediately creating searchable PDF files—a workflow benefit for organizations that constantly reuse documents. ***“We can do full text searches on files in our repository,”*** Dalton explains. ***“That means we can find those documents at a moment’s notice when they’re needed. This is a game changer.”***

***The product [Foxit] checked all of our boxes.***

## A Solution That Delivers

All in all, the Tru team is extremely pleased to have moved to Foxit PDF Editor. ***“The product checked all of our boxes,”*** Dalton finishes. ***“The rollout went well and we’ve had really positive feedback from users. We’re in it for the long haul with Foxit.”***





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