

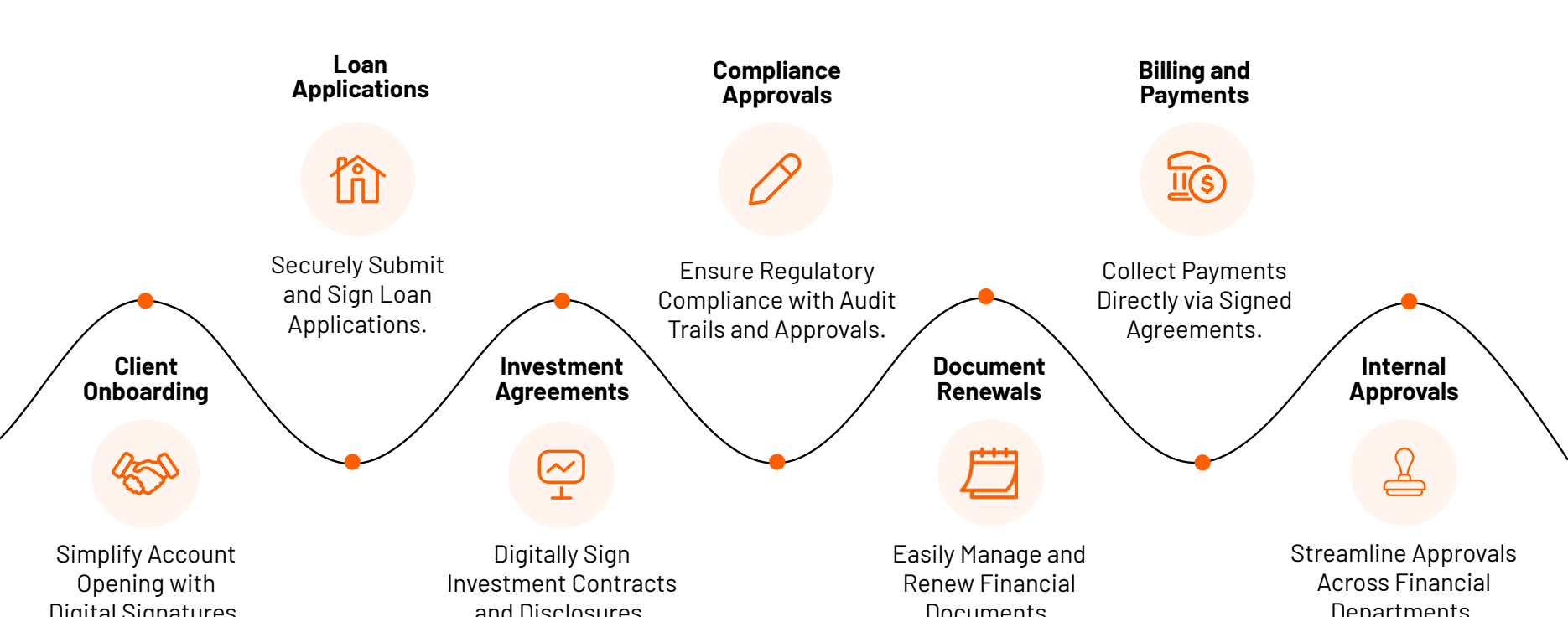


eSign Solutions to Simplify Financial Workflows and Compliance

Financial Services Document Management Made Easy Using Foxit eSign



Simplify financial processes with Foxit's eSign solutions. Manage documents effortlessly, deliver exceptional client service, and maintain compliance with ease—all with plans designed to meet your organization's needs.



All the Compliance and Security You Need is Built Into Foxit eSign Business

- FINRA Compliance
- Audit Trails and Certificates
- Multi-factor authentication (MFA) and Knowledge-Based Authentication (KBA)
- SOC 2 Type 2 and ISO 27001 Compliance



Boost Productivity with Foxit eSign Business's Advanced Workflows

- **Unlimited Envelopes and Templates**
Handle large volumes of financial contracts, agreements, and disclosures without restrictions, keeping your workflows seamless.
- **Bulk Sending**
Save valuable time by sending personalized account agreements and client statements to multiple recipients in one step.
- **Custom Workflow Rules**
Speed up approvals and signatures by automating processes, ensuring documents are completed without delays.
- **Document Tracking and Automated Reminders**
Stay on top of every deadline with real-time tracking and automated reminders that keep your documents moving forward.

How Foxit eSign Benefits Your Clients

- **Foxit Pay**
Simplify payments by letting clients pay directly within agreements using credit cards or ACH transfers—fast, secure, and hassle-free.
- **Signable Web Forms**
Streamline processes like account setup and financial agreements by allowing clients to complete and sign forms directly on your website.
- **On-Demand Notary**
Offer remote notarization, making it easy for clients to finalize critical financial documents without leaving their homes or offices.
- **Mobile-Friendly Signing**
Give clients the flexibility to review and sign documents anytime, anywhere, on any device—perfect for their busy schedules.



Financial Advisors

- **Streamline client onboarding** with secure digital forms and eSignatures for faster agreement processing.
- **Ensure compliance** with audit trails that track every document interaction, providing transparency and legal security.
- **Enhance client experience** by allowing clients to securely sign financial agreements remotely, improving efficiency and convenience.

Loan Officers and Mortgage Brokers

- **Speed up loan approvals** with automated workflows and bulk sending for disclosures and agreements, reducing time delays.
- **Ensure compliance** with detailed audit trails and secure document handling to meet regulatory requirements.
- **Simplify client interactions** by offering secure, remote eSigning options for loan agreements, improving overall client satisfaction.



Compliance Officers

- **Speed up loan approvals** with detailed audit trails that record every action on financial documents, supporting audits, and reviews.
- **Strengthen data security** with multi-factor authentication and secure document storage, ensuring sensitive information remains protected.
- **Ensure fast, compliant document handling** with customizable workflows designed to meet strict industry standards like FINRA.

Wealth Managers

- **Enhance client relationships** by streamlining portfolio management agreements with secure, digital eSignatures.
- **Reduce administrative burdens** by using reusable templates and automated workflows for routine client communications.
- **Ensure compliance** with audit trails that track every document interaction, ensuring that sensitive financial data remains protected.



Accountants and Auditors

- **Automate document tasks** like sending client financial reports or gathering signatures for audit approvals, saving valuable time.
- **Enhance document security** with secure eSignatures and multi-factor authentication, ensuring financial statements are protected.
- **Maintain compliance** with detailed audit trails that track every action on documents, supporting transparency and regulatory reviews.

See What Foxit eSign Business Can Do!

Start Free Trial