



SOLUTIONS FOR RIAs

THE INDUSTRY PARTNERSHIP FOR A WINNING SOLUTION

Whether you're looking for solutions that automate forms processing for both your advisors and your home office, an enterprise e-Signature solution, or other technology to simplify business processing, we want to partner with you. Here's a preview of some of the services we offer to RIAs.



LASER APP ANYWHERE

MOBILE FINANCIAL FORMS AUTOMATION

Allow your reps to auto-fill the industry's largest forms library with data right from their CRM from any mobile device. Once these intelligent forms are complete, they can be saved, printed, e-Signed and transmitted to the BD home office for processing. This reduces your Not In Good Order, increases efficiency, and eliminates home office data re-entry.

CUSTOM FORMS

ADD YOUR FORMS TO LASER APP

The power of Laser App forms filling is now available for advisors offices. This new service programs advisor office forms to receive client data just like any other form in the system. These forms can be bundled with others to make a complete packet for any transaction.

LASER APP ACCOUNT OPENING

THE FASTEST WAY TO OPEN ACCOUNTS

Instantly open accounts with the industry's leading custodians with the client data you already have. With just a few clicks, a new account can be opened directly with any participating custodian. Save time opening new accounts, reduce rejected submissions and get paid faster.

