



LASER APP

FINANCIAL FORMS MADE EASY

Laser App provides Broker Dealers and RIAs with a simple approach to processing new business and service orders by automatically filling client information from leading client management and proprietary systems. Laser App can use the client information to populate order entry solutions or automatically retrieve and fill the latest version of the forms needed for any line of business, including life insurance, annuities, securities, clearing, custodian, and proprietary paperwork.

The system integrates seamlessly with cloud-based CRMs and account opening tools to prefill your investment, insurance, advisory, and broker-dealer forms. Once e-forms are prefilled, they can be printed, saved, or electronically signed & securely transmitted.



ACCESSIBLE ANYWHERE

Accessible deployment styles to match your needs. Whether you want to use Laser App anytime, anywhere, on any device, directly from a desktop installment, or fused on your website for easy advisor accessibility, Laser App has the flexibility to meet your deployment needs.

LEVERAGING YOUR EXISTING DATA

Your prospect and client data has already been captured. Why reenter it multiple times, into multiple forms? As a Laser App user, you can leverage what already exists, by pre-filling forms with data from your preferred CRM or account opening system.

REDUCE NOT IN GOOD ORDER SUBMISSIONS

Laser App reduces NiGO applications by providing advisors with correct forms, ensuring they are the most up-to-date versions, and prefilling fields with customer data. One-time standard data mapping and standardization of rules ensures applications cannot be submitted with incorrect or insufficient data.



FEATURES

- One unified location for over 33,000 forms
- 180 - 200 client fields in a common data model
- Built in e-Signature integration allowing electronic signing on any form
- Forms programmed to fill out 60 - 80% of new account forms
- Standardization of rules reducing NiGO application
- Available on Mac, PC, and Mobile Devices



BENEFITS

- Reduced Not in Good Order submissions
- A streamlined, efficient order process
- Mobilized advisors with ability to complete forms anywhere
- Reduced shipping and administration costs
- Expedited sales process and shorter cycle times