

# AUTOMATING FINANCIAL FORMS



ADVISOR TRANSITION



CLIENT ONBOARDING



ASSET MOVEMENT



ORDER ENTRY



FORMS MANAGEMENT



E-SIGNATURE

**iPipeline's 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** from more than 300 financial firms in one library, this solution offers financial firms the largest selection of forms for advisors.

With Laser App, advisors can seamlessly complete securities, annuities, life insurance, and home office applications through clearing firms, custodians, and insurance carriers.

Our cloud-based solution uses the latest technology to leverage client data from **30+ pre-built** integrations from the market's most popular CRM solutions. This can populate order entry solutions or automatically retrieve and complete the latest version of the forms needed for any line of business, including life insurance, annuities, securities, clearing, custodian, and proprietary paperwork.

By using the most up-to-date and industry-regulated forms and product applications, Laser App helps ensure compliance for advisors.

## FEATURES



Programmed to fill out 60-80% of any given form



Powerful e-Signature integration



Centralized location for all forms



Service multiple accounts in a single transaction



Pre-built CRM configurations and integrations



Standardization of rules reducing NIGO application for broker-dealers

## BENEFITS



Increases the speed of filling orders by 10x\*



Reduces Not in Good Order submission for brokers/dealers



Eliminates up to 80% of compliance costs\*



Reduces transactional cost by up to 60%\*



Expedited forms automation



Reduces the time for data entry by up to 80% for advisors\*

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



**SCHEDULE A DEMO**

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