

Web-based workplace for companies on the move.

MyOffice™ from iPrism Global offers an affordable online workplace for financial services companies and other organizations with mobile workforces, multiple locations, or regulatory requirements.

Our enterprise-level solution integrates and streamlines documents, passwords, and communications into one easily customizable system that can be up and running in days – not months. It's simple, secure, intuitive, and intelligent.



Financial Services Solutions

MyOffice™ has extensive experience and expertise in the financial services market that allows us to provide specialized solutions for that industry.

- **Seamless, Single Sign-On (SSO)** integration of all 3rd party applications, websites and work tools used by staff and reps or agents.
- **Integrated workflows** provide seamless, paperless connections among reps, clients, and internal departments including Compliance, Operations, and Document Management and Storage.
- **Forms Wizard** speeds creation of new accounts and transactions by providing two-way integration with the system CRM and account processing systems.
- **MyOffice™ product workrooms** provide direct communications between product sponsors, investment representatives, and investor customers. Share marketing materials, investment documents, training and seminar information, and account summaries through one convenient pathway.

MyOfficePortals.com • (855) 730-0998 *toll-free* • info@MyOfficePortals.com

iPrism Global, Inc. • 701 Tama St. • Marion, Iowa 52302



Secure.

- Our **3-tier IT infrastructure** incorporates state of the art technologies in a secure network.
- Uses **Secure Socket Layer (SSL) encryption and authentication**, the same procedures used by literally all financial services and web commerce companies in existence today.
- **Hosting facilities are SAS-70 Type II compliant** and feature redundant firewalls, state-of-the-art private network architecture, system redundancies, automatic data backup, and intrusion detection systems.



Integrated.

- MyOffice portals feature **Single Sign-On (SSO)** of all worksites and tools used in processes, allowing quick, seamless navigation through those sites and tools.
- Uses **industry-standard API integration** to add worksites and tools quickly and easily.
- Current **SSO integrated worksites** include Streetscape, DST Vision, Arc Insight, Annuity Intelligence, Laser App, Investigo, Live Office Exchange, and many others.



Flexible.

- **Enables the flexibility and economic benefits of off-site employees** without sacrificing collaborative access to documents, work tools, or work processes.
- **Features can be added or changed quickly**, allowing customers to respond to new opportunities or changing market conditions.
- MyOffice **enterprise databases** can incorporate and accommodate existing CRM systems.



Easy to deploy.

- MyOffice uses a **powerful proprietary software platform** that speeds development and deployment of work portals.
- **Core functionality and processes reside within the platform**, so development primarily involves customization rather than time-consuming and expensive ground-up creation.



Smart.

- MyOffice **integrates document creation and management capabilities** with unique customer workflows to create a seamless system that saves both time and money.
- Documents are created using a **Forms Wizard that provides two-way communication and integration** between the CRM and the transaction at hand.



Compliant.

- MyOffice solutions meet the needs of enterprises that are subject to **internal or external regulatory or policy-driven compliance** controls or conditions.
- **Transparency and auditability** are built into the system in every instance. Employee interaction with data and documents are documented and time-stamped to assure process integrity.
- **MyOffice data archives are FINRA-compliant.**



Affordable.

- MyOffice solutions can be **developed and deployed at a fraction of the cost** of similar high-functionality enterprise solutions.
- The MyOffice platform has been developed in a **highly modular design**, allowing quick and affordable customization and improvements.

MyOfficePortals.com • (855) 730-0998 *toll-free* • info@MyOfficePortals.com

iPrism Global, Inc. • 701 Tama St. • Marion, Iowa 52302