



## Seamlessly integrate all your financial services workflows.

- MyOffice® from iPrism Global is a totally integrated web-based work portal that improves productivity and profits across your entire enterprise.
- Workflows are customized to seamlessly integrate all your internal and third-party tools into a Single Sign-On (SSO) workplace that provides data security and automated compliance.
- MyOffice delivers synchronized CRM, a Forms Wizard, and paperless operations that connect staff, reps, and clients in ways you never thought possible.



### ***Synchronized CRM***

- The CORE of MyOffice
- Built-In or Third-Party CRM
- Integrated Syncing
- Import Tools

### ***Forms Wizard (AOS)***

- Laser App® Integration
- Auto Fill
- Enterprise Data Sharing
- Submission Requirements Reminders
- Digital Client Binders

### ***Automated Compliance***

- Automated Review
- Automated Blotters
- Advertising and Correspondence
- Training and Seminar Submissions
- 17a-3 Letters
- Exception and Audit Reports

### ***Paperless Operations***

- Account Opening and Maintenance
- Transfers and Cashiering
- Trading Desk
- AML Systems

### ***Internal Tools***

- Global Search
- Service Center
- Monitored Email
- Document Archives
- System Reports
- Forms and Newsletters
- Virtual Workrooms
- Commissions Center

### ***Third-Party Tools***

- Trading Platforms
- Back-Office Systems
- Account Aggregation
- Practice Management
- Commission Systems
- e-Signatures

### ***Automated Workflows***

- Automated Routing and Queuing
- Documentation and Reporting
- Strong Audit Trail

### ***Digital Office Interface***

- Unique Home Page for Each Individual
- Tools and Capabilities Appropriate to Position, Licensing, and Permissions
- Customizable at Enterprise and User Levels