

INDUSTRY SOLUTIONS

Financial



BRIDGING INFORMATION PROCESSES

iBridge Group provides Document Management / Content Management Solutions to financial services firms. We provide the industry leading technology to streamline your business processes, improve customer service, reduce costs, and to help meet your compliance requirements.

Financial Institutions such as investment services firms, wealth management, insurance and credit institutions, and mortgage and brokerage firms are all paper intensive environments that need to reduce costs and increase service levels and operational efficiencies, all while complying with various regulatory laws.

“Increased value of client interaction with expanded and self-service offerings...”

Regulatory laws such as Graham-Leach-Bliley, SEC 17a-3 and 17a-4, The Patriot Act, Sarbanes-Oxley sections 302 and 404 for public companies, IRS Rev. Proc. 97-22 and NASD 3010 & NYSE 342.

With iBridge, financial organizations can increase the value of client interaction with expanded and self-service offerings and improved customer service. Automated business processes translate to increased productivity and reduced costs.

RECOGNIZED BENEFITS

- Deploy a central repository with the required security and access control
- Automate business processes through intelligent forms submission and approval
- Apply retention rules to documents to comply with regulations and reduce storage costs
- Track user and document activity performed in the system through auditing features
- Facilitate collaboration from remote sites by providing online access to information and resources
- Provide complete document security and disaster recovery
- Reduction of paper, copy and storage costs
- Improve Compliance with federal regulations in document storage and retrieval
- Provide online access of information and resources to branch offices, remote workers, partners, and vendors
- Adhere to regulatory requirements such as the PATRIOT Act, FRCP, Check Truncation Act and Check

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