APRYSE FOR FINANCIAL SERVICES AND ASSET MANAGEMENT COMPANIES

To succeed in the financial services and asset management industry, companies must prioritize a digital-first approach.

New organizations can put the latest digital infrastructure in place on day one, while more established organizations have the added challenge of transforming while continuing to serve their customers without interruption. That's where we come in — with our industry-leading document processing technology, your company's digital transformation will be accelerated, allowing you to achieve your goals faster.

WHERE APRYSE MAKES AN IMPACT

Customer Workflows: Whether you're onboarding new clients, updating risk tolerance, or completing tax information – forms and documents are at the core of your customer workflow. Unfortunately, traditional paper processing methods are time-consuming, leaving too much room for error and opening your business up to risk.

Internal Workflows: Reviewing and approving documents can be a cumbersome process involving many stakeholders – each with its own set of unique responsibilities and permissions. Coordinating the review and approval process also includes multiple print, scan, and email cycles, leading to reduced efficiency, and increased chance of error, putting your business at compliance risk.

With Apryse, you can transform your customer and internal workflows to a digital-first approach to improve efficiency, accuracy and ensure security and compliance.

OUR CAPABILITIES

FORM CREATION

Quickly transform any paper form, including tax documents, new client applications, and more, to a digital version by uploading a photo of the document. Once uploaded, Apryse can instantly detect form fields and overlay checkboxes and text fields, which enables users to populate the form.

FORM FILL

Tailor how your forms are filled by setting each field to mandatory, optional, or read-only. Automatically populate the form via your data source or manually type information.

TEMPLATE EXTRACTION

Effortlessly set up automated extraction of data from high-volume standardized documents, such as forms, applications, or contracts. Build template libraries for your forms and structured documents, to enable streamlined data extraction from specific areas of a document with high accuracy and advanced preprocessing.

DOCUMENT GENERATION

When communicating with clients or external stakeholders, having the ability to customize reports and communication is vital. With Apryse, you can merge Office form templates with JSON data to generate reports, invoices, contracts, or any other type of personalized document in the browser. This way, you can easily create hundreds of tailored communications in a fraction of the time it would take to do it manually.

DOCUMENT REVIEW

Whether you're assessing AML compliance or reviewing a new client loan application, it is critical that all information is accurate and complete and that errors are addressed promptly. With Apryse, you can edit, highlight and comment on a document directly within a browser and notify any collaborators of changes that may impact them or need action.

DIGITAL SIGNATURE

Clients and employees can instantly sign documents as part of a complete and secure digital workflow. Our Digital Signature has a digital certificate that uniquely identifies the signer and can be verified anytime.

DISTRIBUTE

Redact sensitive information and customize permissions to share publicly or with external stakeholders who should not have access to all the information.

THE APRYSE DIFFERENCE

ACCURATE AND RELIABLE

The Apryse SDK is built in-house with over 20 years of innovation and expertise, bringing you the most accurate and reliable document processing technology.
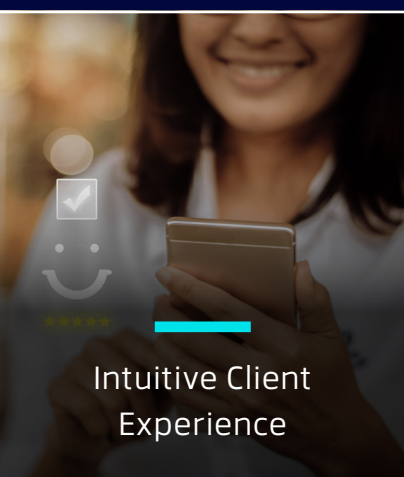
UNMATCHED EXPERIENCE

Build powerful PDF-Solutions using well-documented cross platform APIs that include over 30 file formats and hundreds of features to ensure you design for today and all future use cases.

SECURE AND EFFICIENT

Eliminate risk and maximize performance with an SDK that is secure by its very design. True client-side processing keeps your customers' and users' data on their own device and unlocks instant compliance.

WITH APRYSE, YOUR BUSINESS GETS AHEAD

Intuitive Client Experience

Improved Efficiency

Decreased Risk

Reduced Operating Expenses