

Finance

Straight forward record control, compliance, and disaster recovery

Enhance Profitability, Ensure Compliance

The financial services industry is gripped by complexity and paper trails. With stringent retention requirements, auditing rules, and industry regulations, there is no room for error when it comes to documentation management. The accuracy and organizational efficiency is driving many to re-evaluate the way they do business.

Ease Compliance, Maximize Efficiency

Questys improves the bottom line by making it easier for financial companies to manage and access electronic files and documents. Featuring an intuitive interface and detailed capture, search, and retrieve functionality, Questys helps financial service companies address compliance requirements with industry-specific rules and regulations including:

- SEC, NASD, IRS, and FDIC document retention rules
- Sarbanes-Oxley, Gramm-Leach-Bliley, USA Patriot Act, and FERPA regulations

Automating with Questys WFX Workflow takes business productivity and process automation to the next level by integrating electronic and paper documents directly into your business processes.

The Questys Business Advantage

Questys has proven to save companies thousands of dollars annually. Its user-friendly interface allows for quick file access; making the storage, retrieval, and filing of documents fast and easy for busy financial professionals.

- Save directly from Microsoft and other third-party software applications.
- Keyword and full-text OCR searches instantly locate desired files and documents.
- Protection of document integrity with revision and redaction functions.
- Customizable retention rules ensure information is kept for the appropriate period of time.
- Complete backup and restore procedures make disaster recovery and scalability a snap.
- One comprehensive application instead of multiple modules.
- Standard MSI technology making push installations possible.
- Simplified filing via system-generated bar code cover pages for scanned documents, and drag-and-drop functionality for electronic files.

The Questys Advantage

Throw Out Bulky File Cabinets, Boost Office Productivity

Questys document management software empowers brokers, loan officers, other financial professionals and administrators to:

- **Easily integrate paper records, reports, and electronic files**
- **Accelerate routing and approval processes**
- **Address industry rules and regulations**
- **Improve customer service**
- **Minimize the amount of time and resources spent**

