

# Financial Document Management and Workflow Automation with Vasion Suite

“Vasion’s innovative ‘triggering’ feature supports a greater level of straight-through processing, helping ensure tasks are directed to the correct team and are processed in a timely manner. Working with Vasion has been a pleasure and the support team is quick to respond to inquiries.”

Gregory Curtis | Senior Analyst, Apex

## Manual Processes Struggle to Keep Up

As organizations move towards digital transformation, manual processes for onboarding clients, account maintenance, and auditing are becoming outdated, and less efficient.

You want to support your clients in every way you can. In a volatile market, you’re always trying to stay ahead of the curve by investing time and money to meet new requirements, which can leave you feeling frustrated and overwhelmed.

You need relief from:

- Feeling behind on new compliance requirements
- Manual processes with slow turnaround times
- Other solutions nickel and diming for features and capabilities
- Sifting through and storing tons of paper
- Siloed software and systems
- Manually entering account information and updates

### KEY BENEFITS



#### Inspire trust for new clients

Vasion Suite keeps all content secure, yet accessible, raising confidence in compliance and data protection.



#### Maintain up-to-date compliance

Keep track of all your documents in a centralized, digital space to meet recurring audit requirements.



#### Improve user experience

Enjoy accelerated client onboarding, reduced turnaround time and errors, and straight-through information processing by automating processes.



#### Save operational costs

Vasion Suite gives you the automation tools you need, while reducing material, printing, and storage costs.

### Customers Put Their TRUST in Vasion

8,000+

Over 8,000 customers globally trust Vasion.

11 million

automated business transactions every single day.

94%

Vasion customer retention rate for more than a decade.

# All Your Automation Needs in One Solution

We promise there is a better way to do this. With all your business automation tools under one roof, Vasion Suite gives you the opportunity to meet your document management needs and build confidence in your processes.

## Centralized Document Management Suite

Manage all client and financial records, contracts, and client onboarding tasks in a centralized, secure place for quick and easy access.

## Digitize Paper Documents

Physical copies of important documents can be vulnerable to human error, causing compliance issues. Scan in data from important documents and fill out intuitive eForms to reduce errors and mishandling.

## Legally Binding eSignatures

Electronic signatures accelerate the process of signing legally binding contracts and agreements. The electronic format also proves signer consent, maintaining further compliance.

## Automated Workflows

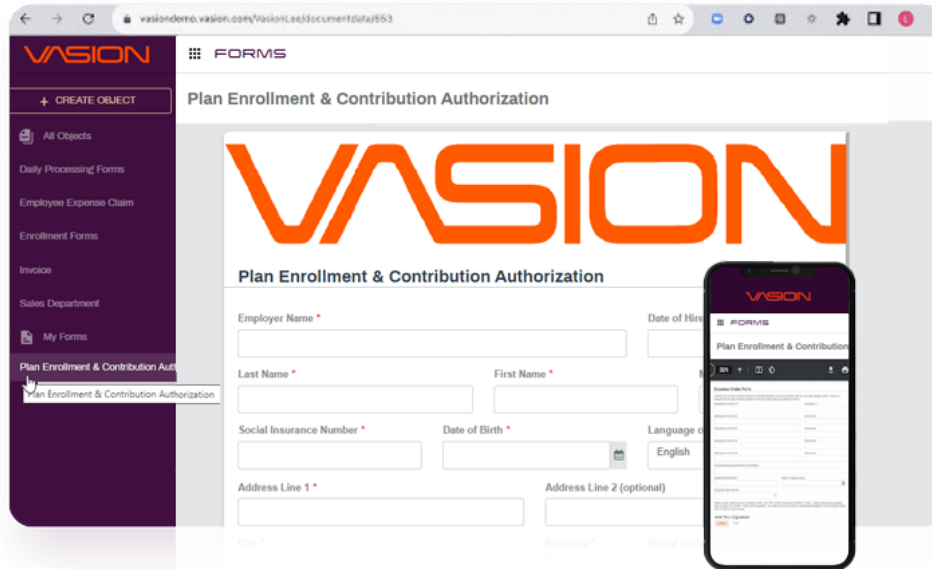
Save time and cost on once redundant and manual tasks by connecting your workflows to eForms, eSignatures, storage, printing, and more.

## Secure Document Storage

Fire your filing cabinets to digitally store client records and internal files in Vasion Drive storage or other cloud storage applications such as Box, Google Drive, OneDrive, AWS S3, and more.

## Auditing and Reporting

Run reports on workflows, storage, and more for a simple auditing process.



Interested in moving towards more efficient and compliant processes with Vasion Suite?

Visit our [website](#) and [schedule a demo](#) today.

[Schedule a Demo](#)