

# FINITY360™ Portal



PORTAL

**Finity360 Portal is a natively built Salesforce services Portal that allows your customers to communicate directly with you.**

Finity360 Portal is a native built Salesforce services Portal that allows your customers to communicate directly with you. Create private Workspaces to securely share sensitive financial information with your clients and colleagues. Send updates and get your materials reviewed quickly and with confidence. Customize your Workspaces with your logo and brand colors to reassure clients and keep all your online tools consistent. Customers can access their new account agreements, historical statements, store performance reports text and chatter using regulatory approved communications filters.

## Create a better user experience for your customers

Create private Workspaces to securely share sensitive financial information with your clients and colleagues. Upload multiple files at once by simply dragging-and-dropping them directly into your browser. Every event that happens in your Workspace is tracked to see exactly who interacts with your files. View high quality previews of more than 30 different file types, directly in Salesforce desktop and on mobile. Secure spaces and folders make it easy to organize your folders and files exactly the way you want them.

## Key Benefits

- ▶ Securely host and manage your client documents.
- ▶ Great for Advisor transitions.
- ▶ Integrates with chatbots and other Salesforce apps.

## Exact requirements for your business

Send updates and get your materials reviewed quickly and with confidence. Post messages and assign tasks within your Workspace to make collaborating with partners easy, safe and secure.

Communicate directly with your customers and maintain your advisory surveillance. Your content is given bank-level encryption in transit and at rest. Only the people you invite can access your data. You determine exactly who has access to your content and the level of permissions each user has.

## About Finity360

Finity360, an innovation of Arcus Inc., is a suite of cloud-based document and data management solutions that gives financial institutions the agility, scale and security they need to gain maximum business value from their traditional documents, digital assets, and operational workflows.

Based on more than 30 years of experience in capital markets, securities back-office operations, data aggregation and system integration, Finity360 helps capital markets and other financial services organizations modernize their operations and revenue models by eliminating technology, process, data and regulatory challenges.

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