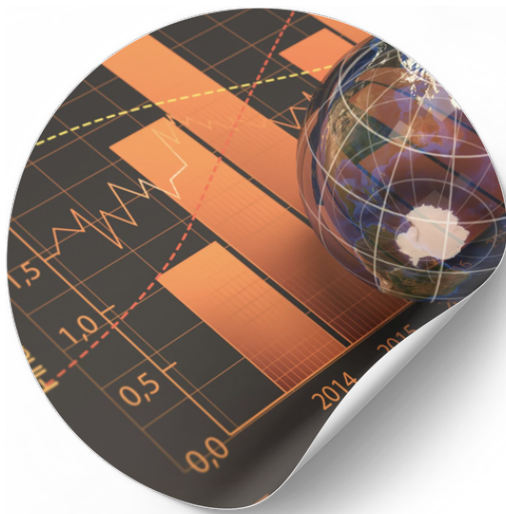


Empowering Financial Services with Document GPS



Financial services teams face key document challenges, including:

- Limited visibility into who accesses sensitive files
- Version control issues from manual processes
- Data leakage risks due to unsecured sharing
- Inefficient collaboration across departments and with clients further slows workflows and impacts service delivery.

These problems are intensified by strict regulatory requirements which demand robust audit trails and access controls.

Document GPS streamlines workflows for financial services and finance teams by transforming static documents into secure, trackable, and interactive digital assets.

Document GPS creates immutable audit trails that support compliance with financial regulations such as FINRA, and GDPR. Its granular access controls, encryption, and detailed logging help ensure data integrity, reduce risk, and simplify regulatory reporting making it easier for finance teams to meet compliance obligations while operating more efficiently.

Regulatory Reporting

Ensure accurate, auditable submissions to regulators.

Client Onboarding

Securely share sensitive documents (e.g., KYC, financial statements).

Internal Approvals

Track document status across finance, legal, and executive teams.

M&A Due Diligence

Provide secure, time-bound access to financial documents and data rooms.

Key Benefits

Track Document Activity

- See who opened, viewed, or interacted with a document in real-time
- Audit trails for every access point both internal or external

Ensure Compliance and Data Security

- Built on blockchain technology for immutable records
- Meets standards for financial data protection and auditability

Collaborate Seamlessly

- Replace email attachments with secure live documents
- Allow stakeholders to collaborate in real-time or asynchronously with full visibility

Control Access Granularly

- Set permissions for view-only, edit, or revoke access at anytime
- Prevent downloading, copying, or unauthorized sharing

E-signature and Digital Signature

- Sign directly within your email
- Unprecedented convenience and security

For more information, visit our [website](#) or view the solution specific webpages for [Real Estate](#) | [Healthcare](#) | [Legal](#) | [Education](#) | [Financial Services](#)