



Finity360™ Tracker

Digitally manage, communicate, deliver and ensure Tracker client Communications

Finity360 Tracker digitizes a set of legacy processes in the financial services industry that will only become more onerous as specific regulations will require customers to acknowledge (not just mail & read) disclosures, investor communications, address changes, etc.

These are all legacy processes that are currently in place today and require “scheduled” mailings. The overhead of the publishing, printing, and mailing are reason enough to digitize these processes, but the more important aspect is that there is no current way for Custodians, BD’s or Advisors to track and maintain an archive of acceptance.

This will inevitably change. And will strengthen the compliance of any firm as they will have an audit trail of not only sending but accepting these required investor communications.

Key Benefits

- ▶ Manage, process, and track all required investor communications digitally
- ▶ Deliver communications between investors, advisors, and back-office that are trackable
- ▶ Address form changes to disclosures-event-based and scheduled triggers automate invest communications initiation



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.

1500 Chestnut St. #1009
Philadelphia, Pa 19102
USA

+1 (888) 942-7287

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