Treeno Document Management Solution
Raymond James Financial Services

"Treeno Software provides an easy to use document management system that has allowed us to increase efficiencies in our day to day operations."
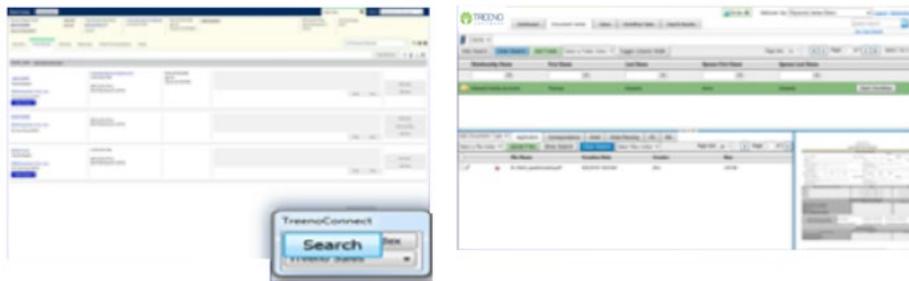
Tony Fusco
Registered Principal, RJFS
Branch Manager, RJFS
Fusco Financial Associates

"We have been in business for over 33 years and while we knew going paperless was necessary, it was also a daunting task. Treeno has made the process seamless and the efficiencies we gained were immediate."

Mark J. Smith
President, Branch Manager
RJFS
MJ Smith and Associates

Financial Management companies, like yours, manage hundreds, if not thousands of physical documents each day. Managing paper not only increases the cost of doing business, but puts an organization at risk for information exposure and loss. Treeno's Document Management Solution (DMS) will allow you to save time and money — while ensuring greater protection of your clients' information assets.

Treeno's DMS allows you to easily set up electronic filing cabinets and electronic client folders that mirror how you file today. Treeno's integration with Raymond James' Advisor Access means your client folders are just a click away. Imagine accessing a client record with a single click and having all the related documents at your fingertips.

Document retrieval time and storage space, are large costs for paper based companies. With Treeno DMS you have secure access to files from the convenience of your desk, the customer site, from home and while on business. Treeno provides secure encrypted access to your clients' data 24 X 7. Treeno provides measurable improvement in productivity and customer service.

TREENO
SOFTWARE

Ensure Document Integrity and Security

The ability to track and control sensitive information using a centralized repository and clear audit trail is paramount for financial services organizations. Treeno DMS includes comprehensive audit trails which include the following: task date/timestamp, task originator, task description and related document activity history.

Simplify Regulatory Compliance

Financial services organizations like yours are under constant pressure when it comes to staying current with regulatory compliance issues. Treeno's DMS helps you stay in compliance with FINRA, SEC, Sarbanes-Oxley and NASD regulations by providing secure, audited and unalterable access to financial transaction records that must remain secure for years.

Reduce your audit preparation process from weeks of tedious work, down to hours using Treeno. The first step towards ensuring compliance with security requirements is taking command of your content.

Discover the Power of Treeno DMS

Treeno empowers financial services organizations to improve client satisfaction through streamlined operations, improved efficiency, reduced costs and simplified audit preparations.

Raymond James Financial Services relies on Treeno to:
- Secure and protect sensitive information and customer confidentiality
- Improve internal productivity and strengthen member service
- Reduce operating costs (storage, retrieval, photocopying, and administration)
- Enable productivity tracking and accountability, ensuring turnaround requirements are always met
- Reduce demand for physical storage space

ABOUT TREENO SOFTWARE
Established in 2002, Treeno Software is a leader in the Enterprise Document Management (EDM) industry. Treeno Software's mission is to provide their customers with operational workflow efficiencies and measureable return on investment (ROI) through the fast installation and implementation of their fully secure, highly reliable, and easy-to-use, web-based Enterprise Document Management (EDM) Software Solution.

To learn how Treeno can help you— call **800.528.5005** or visit us on the web at **treenosoftware.com**.