

OVERVIEW

Treeno Enterprise Document Management 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
President
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
MJ Smith and Associates

Your company probably processes hundreds, if not thousands of physical documents each day including client applications, trade confirmations, wealth management documents, client financial statements and loan agreements. You need an easy-to-use, yet powerful system that helps you to access manage, and share those documents across different business application, departments and locations. With Treeno Software your professional staff will have complete control of your documents.

Automating your repetitive business processes like sign of provides measurable improvement in your productivity and customer service. Treeno Document Workflow Automation allows you to quickly and accurately move electronic documents through your workflows. Built in detailed reports help you monitor your processes.

Treeno's financial services solutions help you stay in compliance with SEC and NASD regulations by providing secure, audited and unalterable access to financial transaction records that must remain secure for years.

Discover the Power of Treeno Enterprise Document Management (EDM)

Treeno EDM is an easy-to-use and extremely powerful integrated content, document and workflow management system that enables insurance organizations like yours to capture, organize and share any type of digital or paper-based document within a secure, central repository. System deployment is effortless, document retrieval is instant, integration with existing applications is seamless and the Treeno system can scale to support as few or as many users as your organization requires.

Treeno empowers your insurance organization to improve client satisfaction through streamlined operations, improved efficiency, reduced costs and simplified audit preparation.

Transform Your Organization

Deploying and operating a document management system should be as simple and effortless as using familiar business applications. Treno EDM integrates with legacy systems such as core processing, cash management, loan origination, call center, portfolio accounting, ERP and CRM solutions, delivering a single point of access to information and workflow across your financial enterprise. Treno EDM integrates with legacy systems such as core accounting and CRM solutions, delivering a single point of access to information and workflow across your insurance business.

Simplify Regulatory Compliance

Reduce your audit preparation process from weeks of tedious work down to hours using Treno. Financial services organizations like yours are under constant pressure when it comes to staying current with regulatory compliance issues. The first step towards ensuring compliance with security requirements including Gramm-Leach-Bliley Act, FFIEC, California SB 1386, and Sarbanes-Oxley is taking command of your content.

Treno EDM simplifies the regulatory compliance and audit preparation process for by storing, capturing, organizing and sharing necessary and appropriate documents in a centralized, secure repository, while automated business process automation capabilities streamline information access, tracking and reporting.

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. Treno EDM includes comprehensive audit trail capabilities, including task date and time stamp, task originator, task description and related document activities. With Treno you can eliminate the possibility that documents stored in your EDM system will be altered without detection, ensuring undisputed authenticity of records. And, integrated notification capabilities can inform management when relevant content within the repository is updated.

Financial Services Organizations Rely on Treno to:

- Ensure regulatory compliance and reduce audit preparation time (i.e., GLB and Sarbanes-Oxley)
- 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
- Streamline integration with existing management systems
- Exchange data rapidly with all departments
- Simplify enterprise wide access to critical documents
- Reduce demand for physical storage space

ABOUT TRENO SOFTWARE

Established in 2002, Treno Software is a leader in the Enterprise Document Management (EDM) industry. Treno 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 Treno can help you— call **800.528.5005** or visit us on the web at **trenosoftware.com**.