ENTERPRISE CLOUD-BASED SHARING FOR YOUR FINANCIAL SERVICES INSTITUTION

The proper management of customer and company information to avoid security risks, such as theft or alteration of data, is paramount for financial services organizations. And the ability to collaborate safely and securely on sensitive documents with associates inside your organization, as well as with third-parties, like auditors and loan servicers, is a critical element in speeding business processes and remaining competitive in a challenging market.

Of course, collaboration already occurs in financial institutions. But it likely occurs via unsanctioned public file-sharing tools, inefficient email and USB drives or IT-resource-intensive FTP sites. This leaves gaps in visibility, security and control.

ShareBase can add value across your financial services institution and beyond by equipping your employees and external stakeholders with secure sharing capabilities.

Sharebase applications in financial services

Lending: Offer your customers or members secure, 24-hour access to loan-related documents and packages. The ability to email a secure link makes correspondence simple and safe. Share files externally with third parties, such as title companies and servicers, knowing the information is secure.

New account opening: Safely share pertinent documents with customers or members and allow them to share supporting information with your financial institution. When multiple signers are involved, a new account can be started at one branch, and documents can be securely passed on to signers at another branch.

Auditing: Make audit logs and other documentation available to external auditors, ensuring corporate and industry compliance standards are met while reducing the cost of billable hours. To speed the process, OnBase can automatically add documents to ShareBase and utilize workflow to notify recipients by sending secure links via email. You can also add password protection and expiration dates to further protect information.

For more information, visit ShareBase.com ››

ShareBase®
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