



The perfect Document Management Solution for Financial Services firms

For more than two decades, Worldox has provided innovative document management solutions to legal and professional services markets.

A growing number of financial firms use Worldox.

They look for document security and control. Worldox delivers much more: powerful search tools, effortless integration with email and contact software, plus easy ways to prepare files for client or compliance review.



The best way to find, use and profit from all your information!

“What can the Worldox Document Management System (DMS) do for me?”

It comes down to “relationships”. Worldox provides tools to identify and store files in logical ways, intuitive to the way you work. You can relate and group like documents, as well as version and track content changes accurately over time. Files are instantly accessible, and can be easily retrieved for working with clients, compliance or other purpose. Managing files this way saves time and facilitates communication, key advantages in improving service and client relationships.

“Why choose Worldox?”

Worldox is powerful, yet remarkably easy-to-use. In addition to the standard DMS features (classify, store files), Worldox empowers advisors, managers and IT staff with unique tools for collaboration and document sharing. You also get state-of-the-art security for vital firm data, including client or project-based “ethical walls”. Best of all, Worldox integrates seamlessly with a huge range of software - with e-mail, contact management and other financial planning/ management applications - with most programs you use or are likely to use.

Get in touch!

Please call or email today for more details and a price quote:

**sales@worldox.com
(800) 962-6360**



Worldox® GX2

New tools, a new look - a big step forward in power and ease-of-use for this classic document management solution.

A robust, sensible DMS choice for:

- Law firms
- Financial Planners/Advisors
- Investment Advisors/Managers
- Accountants
- Broker/Dealers
- Banks
- Insurance Companies
- Fund Managers
- 3rd Party Administrators
- Institutional Advisors

What your colleagues are saying about Worldox:

"With Worldox, the amount of time saved in meeting preparation is almost inconceivable. Prior to Worldox, the man hours spent on meeting preparation - just the space needs spent on it - were staggering."

Michael Grossman
President, **AdviceOne, LLC**

"In a recent SEC audit ... we were able to respond to document requests almost instantly, thanks to Worldox's marvelous search capabilities."

Angela Aboujaoude
Office Ops Manager, **Lodestar**

"We love the Worldox system ... and that's coming from an accountant who thought I could never survive without my 'paper'."

Robin Hari
Owner, **Robin Hari & Associates**

"We think Worldox is an AWESOME system. I can see over the past six months that it has completely changed my business... it is probably the first (and perhaps only) software I have ever used that actually delivered better than expected."

Sheila Chesney
Owner, **Chesney and Company**

"We had our surprise compliance audit today ... the auditor was very impressed with our electronic Document Management System."

Susan Schildt
Stratford Consulting

The power to:

- **Find files instantly.** (Worldox literally pays for itself in time saved with powerful search tools.)
- **Manage all your files centrally.** Worldox activates automatically as you save, open and work with files... supporting nearly every file type you could use, including Word, Excel, PowerPoint, Mind maps and more.
- **Integrate document handling with e-mail.** This lets you share client communications easily, and find client email quickly via full-text search. (You can even display Worldox within Outlook, or access incoming email from within Worldox.)
- **Integrate Worldox with contact management software,** for single-click access to frequently-used client files.
- **Relate documents.** For example, link all files to be discussed with a client to a meeting agenda. Or, link files as "projects" for easy collaboration with staff.
- **Ensure filing consistency;** use templates and enforced filing criteria to all but eliminate filing inconsistencies.
- **Control access;** protect documents in progress, even create "ethical walls" to secure sensitive files.
- **Ensure audit compliance,** with complete document histories, instant access to files requested by auditors.
- **Share files** with staff, via public bookmarks, and by "subscribing" files in My Workspaces.

Sample Costs:

Let's say you're looking at setting up a document management system for your office, with a staff of 5. How much will Worldox actually cost you over time?

Year	Unit Cost	Cost*
1	5 users @ \$395 (license) 5 @ \$80 (maintenance)	\$ 2,375.00
2-5	5 @ \$80 (maintenance)	400/yr=\$1,600.00
6-10	5 @ \$80 (maintenance)	400/yr= \$2,000.00

Per user/per year, over 5 years: **\$159.00**

Per user/per year, over 10 years: **\$119.50**

*Consulting/installation charges (if any) not included



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