

AUTOMATING FINANCIAL FORMS

FAQs

Q: How is Laser App different from other solutions for forms automation?

A: Laser App leads the market by providing you with access to the largest centralized forms library in the industry, with nearly **33,000 forms**. This enables content owners to store up-to-date forms and pre-fill data, directly from their CRM.

Laser App simplifies processing, making it easy to populate data by integrating with more than **30+ industry-leading CRM** solutions. The solution prefills 60-80% of any selected form with existing data and in completing the process 10 times faster.*

Q: Can I integrate my proprietary CRM with Laser App?

A: Laser App is already integrated with more than 30+ industry-leading CRM solutions, but it can also accommodate additional CRM integrations. This can easily be done by connecting your CRM via the free developer documentation on the website.

Q: How does Laser App protect client data?

A: iPipeline takes the security and protection of client data very seriously. For this reason, Laser App does not permanently store client data, but instead allows admins to set a specific time limit for how long data is saved on forms as a work in progress.

Q: Is Laser App secure?

A: Laser App uses trusted and widely adopted security protocols designed to protect data. We use **Transport Layer Security (TLS)** encryption (HTTPS) with high-grade **Payment Card Industry (PCI)**-compliant ciphers for all data transmitted through our network servers. In addition, we employ redundant, high-availability Cisco firewalls, as well as network switching and load-balancing hardware, to prevent downtime. We also use a third-party to manage intrusion prevention and detection by identifying, logging, and responding to suspicious network traffic. For additional protection, we scan both internal and external networks at regular intervals for vulnerabilities using PCI accepted standards.

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Q: Do you back up and ensure the integrity of my data?

A: In line with the best security practices in the industry, we handle sensitive data by segregating it and assigning access control rules at the network and application levels. All sensitive data is encrypted using the Advanced Encryption Standard (AES) and replicated securely at regular intervals across our two AWS cloud platforms. By logging application-level sessions, we can better assess threats, analyze errors and act quickly to mitigate and limit business disruptions.

Q: How do we keep our forms up to date?

A: Our iPipeline team has ongoing relationships with the carriers and fund companies whose forms are included in our library. This helps ensure we have the most up-to-date versions. By managing form updates and mapping on one centralized system, we maintain the largest forms library in the industry with nearly 33,000 forms.

Q: What kind of support does Laser App offer?

A: Our dedicated support team is available online, 24/7 for both admins and end users of Laser App. We also provide phone support, which is available Monday through Friday from 7 a.m.-4:30 p.m. PT. Our support team can be reached at laserappsupport@ipipeline.com.

Q: How easily can I add my advisors to the platform?

A: Adding users in Laser App is easy, using the solution's built-in user management system, admins can upload and configure users either individually or in bulk using a spreadsheet.

Q: Can I add my own forms to Laser App?

A: Yes. Users and financial firms can easily add forms to Laser App, allowing users to bundle forms for each transaction.

**These are average numbers and are not indicative of definite future results.*



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