

# SmartOffice LASER APP ANYWHERE

Combine the power of SmartOffice with Laser App's form-filling solution.

Laser App Anywhere, the Web-based form-filling application from the makers of the industry-standard Laser App desktop solution, offers an ever-expanding library of tens of thousands of forms used by financial services professionals every day. These include in-house forms from hundreds of top broker-dealers, as well as clearing firm, mutual fund, insurance and annuity forms.

With SmartOffice's Laser App Anywhere integration, you can leverage the client data you've already entered in SmartOffice to automatically fill out Laser App Anywhere forms.

## Key Benefits

- Significantly reduce Not in Good Order (NIGO) applications
- Improve the clarity of every application
- Give your reps the power to process applications faster
- Drive productivity in the back office

The screenshot shows a web-based form titled "Client" with a sidebar on the left containing navigation options: Client, Spouse, Beneficiaries, Corporation/Trust, and Banking/Finances. The main form is divided into several sections:

- BASIC INFO:** Last Name/Co. (Bauman), M. (checkbox), First Name (Donald), Address (123 Ocean View St.), Apt# ( ), City (Santa Monica), State (CA), Zip (93001), SSN (123-45-6789), DOB (10/28/1934), Home Phone ((310) 222-2222), Cell Phone ((310) 333-3333).
- ID NUMBERS:** Drivers Lic# (DF245098345), Drivers Exp. (10/13/2014), Drivers Lic Issue Date (10/13/2004), Drivers Lic. Jur. (CA), Passport# ( ), Passport Exp. ( ), Passport Issue Date ( ), Passport Country ( ), Green Card# ( ), Green Card Exp. ( ), Green Card Issue Date ( ), Green Card Jurisdiction ( ).
- MISC:** Salutation ( ), Sex (Male), Marital Status (M), Email ( ), Citizenship (Non Resident Alien), Country of Residence (USA), Client# ( ), Legal Address (123 Ocean View St.), Legal Apt/Suite ( ), Legal City (Santa Monica), Legal State (CA), Legal Zip (93001).
- EMPLOYMENT:** Employer Name (ABC co), Occupation (S/W Engineer), Employer Phone ((310) 111-1111), Phone Ext. (22), Employer Address (999 12th St.), Employer Suite ( ), Employer City (Los Angeles), Employer State (CA), Employer Zip (9006).

With client information exported from SmartOffice into Laser App, you have most of the data you need to complete your Laser App forms.

## Powerful, Time-Saving Form Automation

SmartOffice's Laser App Anywhere integration gives your reps the power to process applications faster than ever. Users simply export contact data from SmartOffice into Laser App Anywhere and select the required form from the library. The integrated solution then fills out most of the required information without requiring the user to type a single word. The result: Forms are completed in a fraction of the time they normally require, and errors are reduced to a minimum.

SmartOffice's Laser App Anywhere integration reduces the occurrence of Not In Good Order (NIGO) applications and helps everyone on your team work more efficiently.

## An Anywhere, Anytime Integrated Solution

Because they both live in the cloud, SmartOffice and Laser App Anywhere offer users a portable, always-available form-filling solution. This cloud focus makes the solution ideal for everyone from reps in the field to back-office staff.

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