

Laserfiche Cloud for Financial Advisors

Laserfiche Cloud is a Software as a Service (SaaS) solution that provides a central digital repository accessible from anywhere.

Search and Retrieval

- Retrieve documents with quick and advanced search options
- Auto-categorize documents for easy retrieval
- View and modify document metadata, annotations and fields

Core Compliance

- Manage records by file plan*
- Audit actions taken on documents
- Choose user access to folders

*Available in June release

Distributed Capture

- Scan client paper records
- File email correspondence
- Directly store office documents
- Import from digital copiers
- Attach documents from a smartphone

Integration

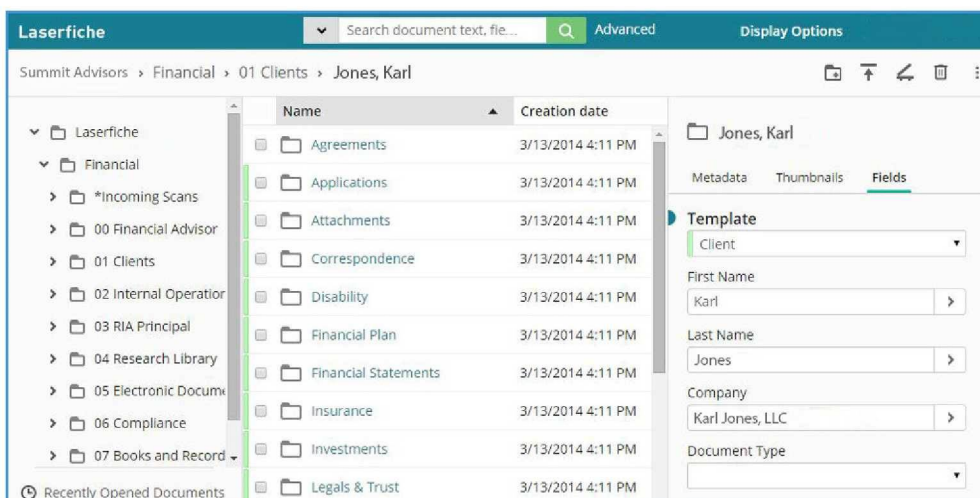
- Connect to documents from most CRMs
- Post signing requests to DocuSign*
- Save to a folder directly from Laser App

*Available in June release

Laserfiche
Cloud

Included

Pricing	\$50	Per user/month, prepaid annually
Storage	<ul style="list-style-type: none"> 1 repository/account Up to 50 GB storage included/user <i>Approximately 250,000 documents or files</i>	
Downloads	<ul style="list-style-type: none"> Up to 10 GB/month of outbound network activity per user per month included <i>Approximately 10,000 downloads/month</i>	
Backups	<ul style="list-style-type: none"> Automatic daily backups for business continuity 	



Access your firm's digital repository from anywhere.

Your Next Steps

Contact Us
(800) 985-8533

Get a Demo
laserfiche.com/demo

Run Smarter®

Laserfiche®