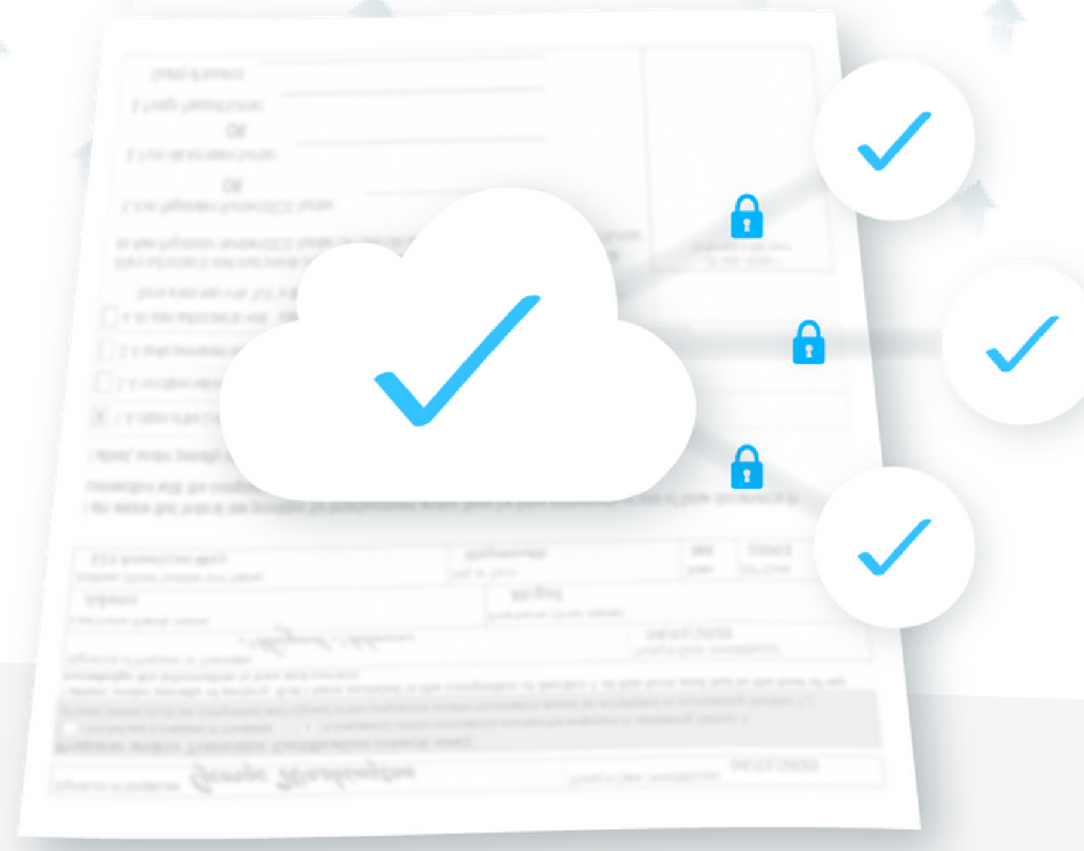
LockDocs

SHAREABLE. SMART. SECURE.



Client lifecycle management made simple

LockDocs offers a fully digital client experience for the wealth management industry.

LockDocs offers financial advisors a seamless way to complete client paperwork so they can focus on providing value-added advice.

The future is formless.

CLOSE CLIENTS FASTER

ROBUST SECURITY

BUILT-IN COMPLIANCE

Key features

- Customizable workflows & compliance
- API integrations automate the secure flow of client data
- Digital signatures provided in partnership with DocuSign

Sample Forms

ACCOUNTS OPENINGS

ANNUAL REVIEWS

GOVERNMENT FORMS

Key benefits

- Drastic time reductions in completing client forms
- Enables a fully digital client experience
- Built-in audit trail and compliance
- Pre-populate client data

Contact

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We thank you for your interest in LockDocs.
For more information, click here to view our short demo video or click here to visit our website.
Ready to get started? Click here to book a demo.