FormIQ - Onboarding
For Regulated Industries

FormIQ 's AI-powered onboarding platform streamlines account openings, applications, renewals, and compliance for regulated industries like capital markets, insurance, real estate, and healthcare. Our no-code workflows replace manual processes with secure, compliant, and seamless digital experiences.

- **Automate Workflows -** Eliminate back-and-forth emails and bottlenecks.
- **Smart Forms & Validation -** Reduce errors with conditional logic and AI-driven checks.
- **Integrated Signatures -** Secure, compliant e-signatures streamline execution.
- **Dynamic Document Generation -** Automatically create agreements and applications from collected data.
- **Centralized Storage -** Secure, encrypted repository with audit trails.
- **Regulatory Ready** - Built-in privacy controls, and security safeguards for compliance.

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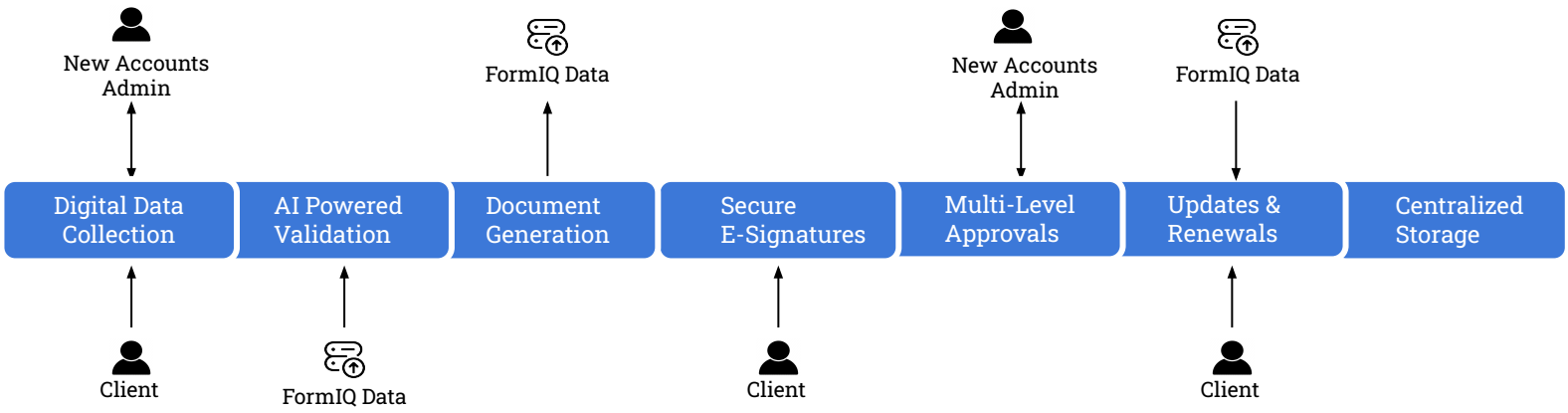
FormIQ Product Feature Highlights:

- **Digital Smart Forms**
- **Intelligent Documents**
- **Full Data Synchronization**
- **Integrated E-Signatures**
- **Mobile-First User Interface**
- **Cloud-Based Platform**

FormIQ Workflow



Experience the future of onboarding. Contact us today to learn more or schedule a demo www.formiq.ai

FormIQ - Onboarding
Benefits, Security, Setup

Faster Onboarding
Cut onboarding cycle times by up to 95% with guided workflows and automated routing.

Reduced Risk
Audit trails, compliance monitoring, and encryption protect sensitive information and ensure regulatory readiness.

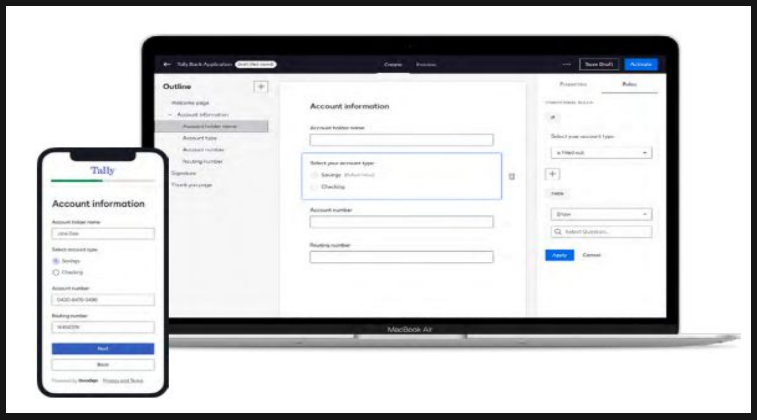
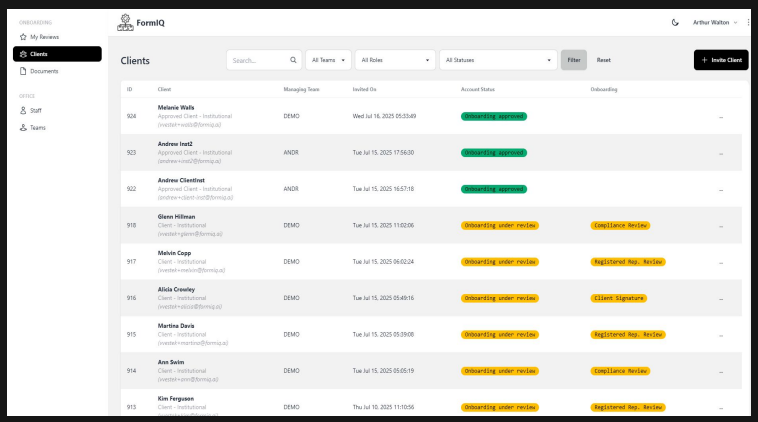
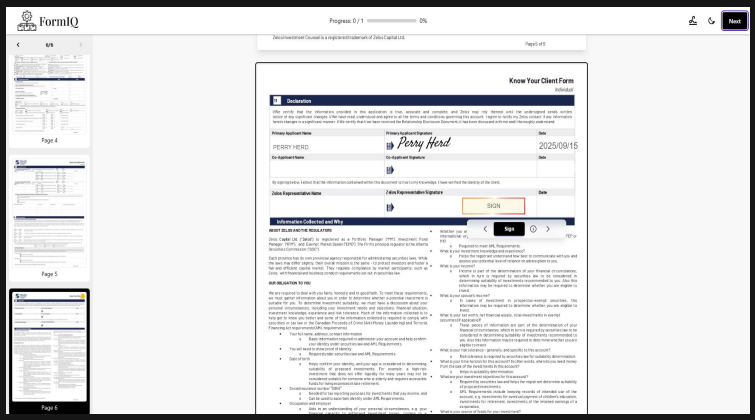
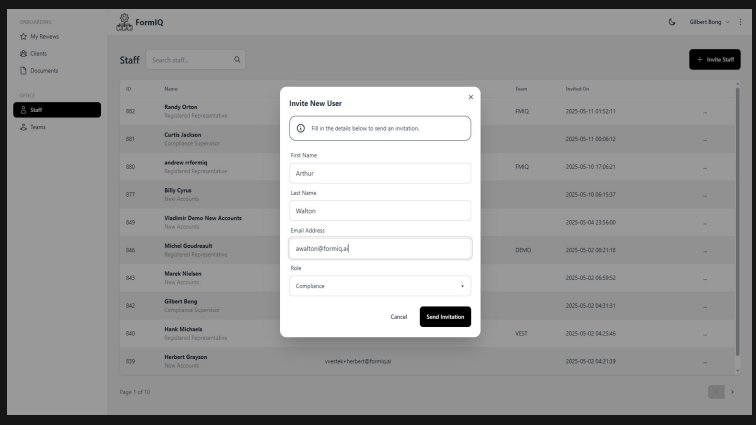
Operational Efficiency
Replace redundant tasks and manual entry with AI-powered automation, freeing teams to focus on higher-value work.

Seamless Integrations
Connect FormIQ to CRM systems, identity and document verification providers, and more to power mission-critical processes.

Scalable Flexibility
Adapt workflows for capital markets, insurance, financing, healthcare, real estate, and education without writing code.

Enterprise Grade Security
Advanced encryption, role-based access, and continuous monitoring ensure compliance and safeguard sensitive data.

Rapid Implementation
Easily deploy FormIQ across your organization with guided discovery, configuration, integrations, and go-live support.

Transform onboarding into a competitive advantage. Contact us today to learn more or schedule a demo www.formiq.ai

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