

# 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.

## FormIQ Product Feature Highlights:



Digital Smart Forms



Intelligent Documents



Full Data Synchronization



Integrated E-Signatures

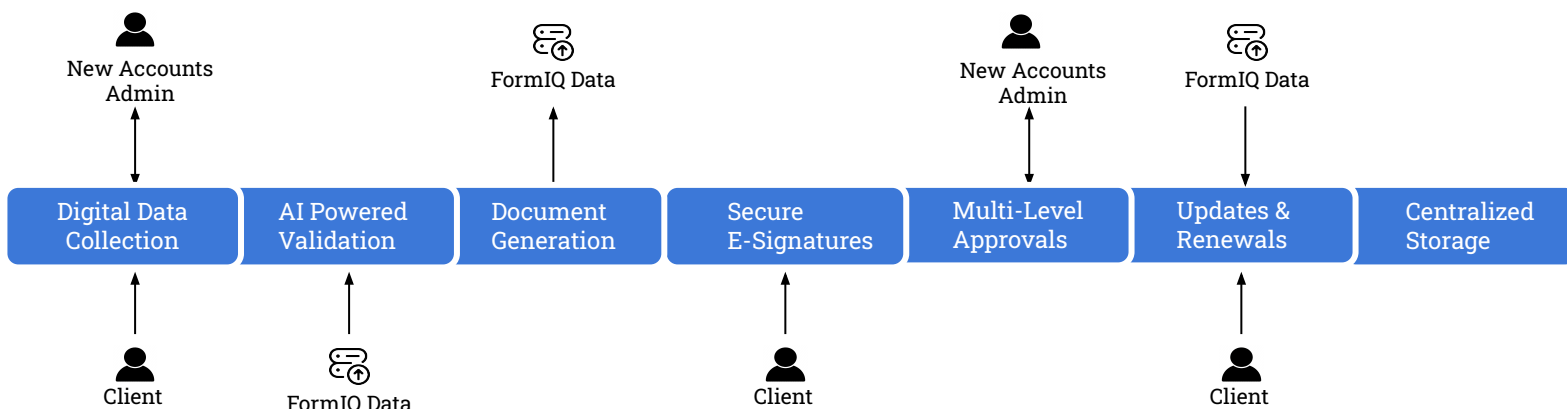


Mobile-First User Interface



Cloud-Based Platform

## FormIQ Workflow



Experience the future of onboarding. Contact us today to learn more or schedule a demo [www.formiq.ai](http://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.

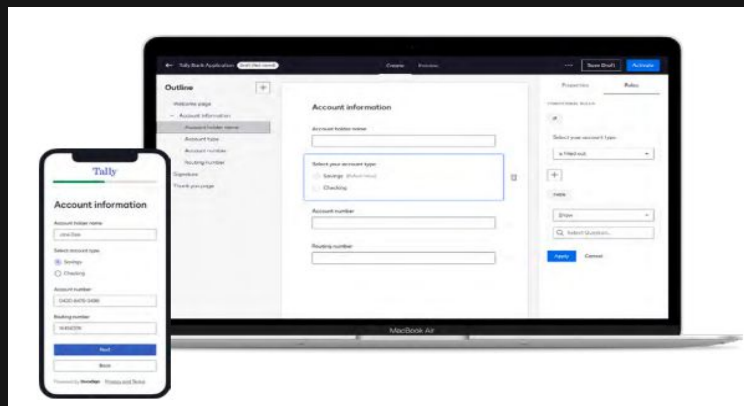
## Rapid Implementation

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

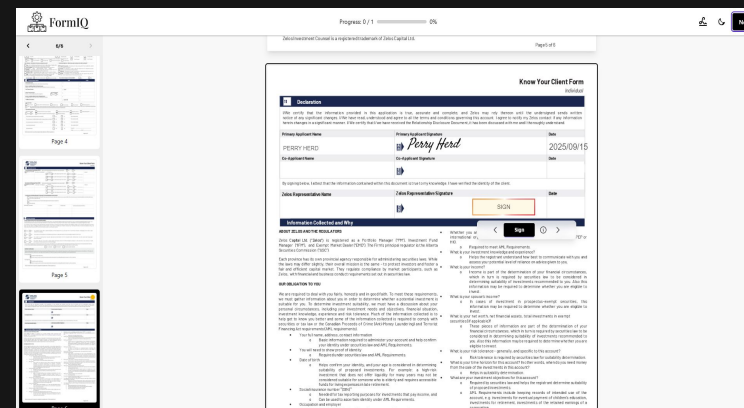
**Transform onboarding into a competitive advantage. Contact us today to learn more or schedule a demo [www.formiq.ai](http://www.formiq.ai)**



FormIQ



ID	Client	Managing Team	Initiated On	Account Status	Onboarding
104	Melanie Wells Approved Client - Institutional (melanie.wells@formiq.ai)	DEMO	Wed Jul 16, 2025 05:53:49	Onboarding - Success	...
103	Andrew Inatt Approved Client - Institutional (andrew.inatt@formiq.ai)	ANOR	Tue Jul 15, 2025 17:56:00	Onboarding - Success	...
102	Andrew Clientatt Approved Client - Institutional (andrew.clientatt@formiq.ai)	ANOR	Tue Jul 15, 2025 16:57:18	Onboarding - Success	...
118	Oliver Hilman Client - Institutional (oliver.hilman@formiq.ai)	DEMO	Tue Jul 15, 2025 11:02:06	Onboarding - Under Review	Collaborate - Review
117	Melvin Capp Client - Institutional (melvin.capp@formiq.ai)	DEMO	Tue Jul 15, 2025 04:02:24	Onboarding - Under Review	Register - Review
116	Alisa Country Client - Institutional (alisa.country@formiq.ai)	DEMO	Tue Jul 15, 2025 05:48:16	Onboarding - Under Review	Client - Signature
115	Martina Davis Client - Institutional (martina.davis@formiq.ai)	DEMO	Tue Jul 15, 2025 05:39:08	Onboarding - Under Review	Register - Review
114	Ann Swain Client - Institutional (ann.swain@formiq.ai)	DEMO	Tue Jul 15, 2025 05:05:19	Onboarding - Under Review	Collaborate - Review
113	Kin Ferguson Client - Institutional	DEMO	Thu Jul 10, 2025 11:10:56	Onboarding - Under Review	Register - Review



ID	Name	Team	Initiated On
101	Randy Orton Registered Representative	PMQ	2025-05-11 01:52:11
102	Curtis Jackson Registered Representative	PMQ	2025-05-11 00:06:12
103	Andrew Inatt Registered Representative	PMQ	2025-05-10 17:06:21
104	Riley Cynn New Account	PMQ	2025-05-10 04:16:57
105	Vladimir Dorena New Account	PMQ	2025-05-04 23:56:00
106	Michael Goodrich Registered Representative	DEMO	2025-05-02 08:21:18
107	Mark Nicksen New Account	DEMO	2025-05-02 06:59:52
108	Gilbert Bing Registered Representative	DEMO	2025-05-02 04:21:21
109	Mark Michaels Registered Representative	DEMO	2025-05-02 04:25:45
110	Herbert Grayson New Account	DEMO	2025-05-02 04:21:09