

13-14 MARCH 2017
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AGREEMENT EXPRESS ALLOWS YOUR FIRM TO PROVIDE A FULLY DIGITAL CLIENT EXPERIENCE.



INNOVATOR: ALYSA KANANI , AGREEMENT EXPRESS

www.agreementexpress.com

PROBLEM ADDRESSED BY THIS INNOVATION:

Our platform solves one of the most complicated, administration-heavy processes in financial services: client onboarding.

KEY BENEFITS:

- The fully digital onboarding process will significantly improve client experience
- Implementing Agreement Express allows firms to compete with innovators and gain market share
- The platform enables insitutions to grow faster with less overhead

PREVIOUS AND EXISTING CUSTOMERS:

National Bank of Canada, HollisWealth, Vantiv, Global Payments, Elavon, Investment Planning Counsel, M&T Bank, Cayan, Questrade, Ivvari, Merchant e-Solution

INNOVATION DESCRIPTION:

Agreement Express allows your organization to scale faster with less overhead, by automating the entire onboarding process from completing and signing merchant applications digitally, to KYC, underwriting, and final sign-off. What used to take weeks can be done in less than one hour with Agreement Express. With your whole team working from one platform, your organization will be able to design consistent, standardized processes with total visibility into each application, at every stage of the onboarding process.

HOW DOES THIS INNOVATION ADD VALUE?

Our platform allows financial institutions to onboard new clients without requiring paper or ink signatures at any point in the onboarding process. Agreement Express reduces administration cost and burden, allows organizations to scale without doubling back-office employee count, and provides end-users with an intuitive HTML-based landing page experience for highly complex onboarding processes.