



Doxim Statement Solutions

For Financial Service Providers

Statement Solutions For Financial Service Providers



Key Benefits

- Deliver customer communications securely, accurately, and on time with Doxim's comprehensive statement processing solution
- Speed the daily batch processing of checks and their upload into Enterprise Content Management (ECM) with Doxim's daily check processing service
- Encourage eStatement adoption with eDelivery via Doxim's cloud-based ECM solution
- Optimize your statements with a broad range of value-added solutions beyond processing, print, and eDelivery

Doxim is the leading provider of document processing and content management services to financial service providers. Backed by a deep understanding of technology, business, and regulatory needs, Doxim has become the trusted provider for over 2,000 financial service providers.

We have been servicing these organizations for 20 years both directly and indirectly through long-term strategic partnerships with market leading service providers.

Throughout this time, our client retention rate has consistently exceeded 97%, year in, year out.

What We Do

Doxim provides advanced statement composition and processing services using data from any core banking platform and outputs documents to both print and electronic formats for online access. These solutions are offered as part of a suite that forms the Doxim Customer Engagement Platform.

Secure-Print Statement Services

Doxim's comprehensive statement and confirm processing responds to demands from the financial service provider industry for an integrated end-to-end solution to help manage the production and delivery of regulatory documents, ensuring that all important customer communications are delivered securely, accurately, and on time. Our services include:

- Data conversion and optimization
- High speed print and electronic document production
- On-statement marketing messages
- Collateral inserting
- Color printing
- Differential bundling and house-holding
- Distribution logistics and hold mail services
- Secure processing environment

DXM Financial Your Investment Portfolio Statement
For June 1 to June 30, 2017

Mr. John Doe
57 Main Street,
Toronto, ON
M8R 8X6

Investment Portfolio ID #
D-1724567890

Your Advisory Team
Edward Smith
Senior Investment Advisor
edward.smith@doxim.com

Portfolio Summary

	Last Period May 31, 2017	This Period June 30, 2017	Total Cash & Securities \$	Total Cash & Securities \$
Asset Type				
CDN Margin	11,652,386.41	14,479,220.20	13,013,115.24	13,306,185.00
US Margin	794,816.62	1,847,880.00	2,805,014.33	812,186.50
CDN BHP	129,893.42	4,500.79	122,388.07	179,884.00
CDN BHPF	124,465.32	418.21	124,883.53	146,696.00
CDN TFS	20,227.77	7.28	20,235.05	20,000.00
Total Portfolio	14,796,934.47	18,131,876.10	16,918,239.04	14,956,961.50

Overall Portfolio Asset Allocation

Market Value (\$)	% of Portfolio	
Cash and Equivalents	5,955.50	0.04%
Fixed Income Funds	1,076,276.78	6.3%
Equities and Equity Funds	18,233,922.05	93.3%
Sub Total	14,234,428.81	100.0%
Debt Balance & Short Securities	11,877,036.05	N/A
Total	14,956,961.50	

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Check Processing And Exceptions Matching Service

For our financial services clients, Doxim's Daily Check Processing service facilitates the daily batch processing of check images received from a clearing agent or service provider, and uploads them in near real-time to Doxim Enterprise Content Management system. This facilitates exception management processes as well as eStatement adoption, as check images are all available for easy appending to an eStatement PDF.

Statement eDelivery

Today, more and more customers want to opt out of printed statements. To accommodate this, Doxim offers advanced eDelivery services via its cloud-based enterprise content management solution. Unlike traditional print service providers, we take the task of driving eDelivery adoption very seriously. This is evidenced by the fact that, on average, Doxim clients enjoy 55% eDelivery levels, almost 4 times the average of other financial institutions. And our top ten percentile of clients exceed 95% print statement opt-out.

Using Doxim ECM, front-line staff can quickly and easily access statements and other documents online using single sign-on via their banking or brokerage platform. Doxim ECM also interfaces seamlessly with online portals, making it easy for customers to access statements, checks, confirms, and other documents online, where and when they need them.

Better Looking Statements

Our enhanced statement design and composition service converts difficult to read, outdated statements into attractive, well laid out statements complete with targeted marketing messages.

Personalized Statement Marketing

Personalized Statement Marketing is an innovative offering that enables financial service providers to improve the effectiveness of their marketing campaigns and reduce the costs associated with preprinted inserts, by placing demographically targeted, relevant marketing messages directly onto statements in both printed and electronic formats.

DXM Financial

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Jane Smith
Your Investment Advisor
John Doe
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YOUR INVESTMENT PORTFOLIO

For the period ending January 31, 2015

Portfolio value on January 31, 2015	\$700,000.00
Portfolio value on December 31, 2014	\$650,000.00

Portfolio by account

Account Type	Account ID	Account Name
Non-Registered	ZS1-89008	Canadian Cash Account
Registered	201-89008	RIFSP Account

MESSAGE BOARD

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Currency
All values and prices are in (CAD), unless otherwise stated.

On January 31, 2015
USD \$1 = 1.3461 \$1.29
EUR \$1 = CDN \$1.34
GBP \$1 = CDN \$1.65

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eNewsletters & eInserts

eNewsletters & eInserts allow newsletter and insert content to be appended to the end of an electronic statement so that it can be viewed online (as one document, contiguous with the eStatement). eNewsletter and eInsert content is dynamically appended to the statement when the PDF of the eStatement is opened. This ensures that your customers who have opted out of print statements continue to receive these important communications.

In-line Inserts/Newsletters

We can also print Inserts and Newsletters in-line with statement itself, so that they become an integral part of paper statements that are delivered by mail. This saves money by avoiding the need to print, fold, and insert these documents as separate items along with the printed statement.

Data Insertion & Merging

Data insertion allows supplementary data to be added to the statement data stream before processing. This makes it possible to do things like adding a MasterCard points balance directly to a statement.

Data Merging allows two separate print streams to be merged together post processing, pre-printing/output. This makes it possible to merge two

documents (e.g. a year-end account report and a December statement) so that they can be mailed out in one versus two envelopes.

Looking Beyond The Statement

Working closely with financial service providers has allowed us to gain a deep understanding of their document needs. This has driven the development and launch of many other eDocument solutions, including:

- Paperless banking reports
- Document imaging solutions
- E-document access via web banking portals
- Year-end tax form processing
- Paperless lending
- Paperless account opening

These statement solutions are delivered as part of the Doxim Customer Engagement Platform. This SaaS-enabled platform addresses key digitization challenges in your organization, from client onboarding automation, through improved, personalized communications to anytime, anywhere content access, tailored to your clients' channel preferences. Digitization eliminates the costs of traditional paper-based, manual processes and enables you to cost-effectively provide an omnichannel experience that delights your customers and improves their long-term loyalty.

Improve your customer experience with easy to understand, attractive statements delivered through preferred channels!

Contact us today to learn more about Doxim's innovative suite of statement solutions for financial service providers.

doxim®

Doxim is the customer communications and engagement technology leader serving financial and regulated markets, providing omnichannel document solutions and transforming experiences to strengthen engagement throughout the entire lifecycle. The Doxim Customer Engagement Platform helps clients communicate reliably and effectively, improve cross-sell and upsell opportunities, and drive increased loyalty and wallet share through personalized communications. The platform addresses key digitization, operational efficiency, and customer experience challenges through our suite of plug-and-play, integrated, SaaS software and document technology solutions. Learn more at www.doxim.com.

www.doxim.com

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