



ezTransfer batch processing software is designed to provide a much more efficient way of completing forms in a batch process where a few forms can be populated from databases that contain large number of clients. The forms are automatically populated and saved for further data entry, if required.

A typical application would be when a number of advisors move from one dealership to another and new forms have to be filled for the new dealership or company for all of the clients. ezTransfer generates pre-populated forms automatically for selected forms and clients and stores them in a specified directory.

The technology is based on the industry leading e/Forms-Financial software with a proven track record since 1999 and over 5000 users in Canada. The system contains the same selection of over 800 industry standard forms including CRA forms that look and feel exactly as the original printed forms.

Features:

- Saves time and reduces costs of manually filling forms for each client.
- Forms are updated regularly
- All fields and check boxes on the forms are active and can be filled using a computer.
- Client information is instantly filled into the fields on the preselected forms from Excel, CSV or MS Access database files.
- Blank forms are served from our secure servers but the data always stays on local system to meet compliance requirements.
- Your dealer forms can be integrated into your version of ezTransfer (at extra cost).
- Professional looking documents.
- Reduces rejection rate at back-office.

Customized Solutions:

Options include integrating company specific forms, links to your corporate standard client and contact management software, and customized user interface with your company logo and colour schemes.

"Delivering Efficiency through Technology"

- ~Instant access to the most up-to-date forms 24 hours a day and from anywhere
- ~Be up and running with ezTransfer within 15 minutes of ordering!
- ~Tech support available through phone, email, or instant messenger
- ~Automatic program revisions and form updates each time you go online

