

NEWS

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Exclusive Partnership Brings Turnkey Straight-Through-Processing Solution to the Financial Services Industry

*Docupace Technologies and Efficient Technology, Inc.
Introduce Real-Time Paperless Processing Service*

LOS ANGELES – January 23, 2012 – Financial advisors continually struggle with efficiency and productivity issues in their day-to-day business operations. Solutions providers, such as Docupace Technologies and Efficient Technology (ETI), are committed to reducing errors, costs and labor through the smart use of systems and technology. The two firms announced today at the FSI Conference in Orlando, Florida, that they have partnered to bring a new standard to the industry.

This exclusive arrangement will bring turnkey, straight-through-processing solutions to advisors through institutional relationships with some of the nation’s largest independent broker/dealers, clearing firms and custodians. Docupace will leverage ETI’s Quik! enterprise forms automation service through the Docupace ePACS system. This will include an up-to-date library of proprietary industry and customer forms.

“This partnership represents a new standard in our industry. Quik! forms are an integral part of ePACS and are offered at no additional cost,” says Docupace CEO Michael Pinsker. “Why pay extra to fill out forms that don’t integrate or work within your process? With ePACS and Quik! our customers get everything they need for opening accounts and processing transactions in real-time, all for a low price, in a turnkey solution.”

The ePACS® cloud-based account opening service coupled with the Quik! forms library gives advisors the ability to seamlessly perform any transaction necessary. Over the past 10 years, Docupace has developed a set of best practices rules and operating procedures. These rules and

procedures enable the ePACS system to be turned on rapidly and to deliver immediate reductions in errors, costs, shipping, paper, phone calls and labor.

“We have reviewed the ePACS concept, and believe it offers the ability to process both brokerage and direct business on a single electronic platform at an enterprise level. Broker/dealers have been seeking this capability to significantly improve their operational efficiency” says Gwen Rogers, Vice President of Client Services at Williams Financial Group, an independent broker/dealer based in Dallas, Texas. “Integrating the catalog of Quik! forms within the ePACS solution, should enable advisors to pre-populate the data; any solution that reduces the need for redundant manual data entry provides real value to both investment professionals and the broker/dealer’s back office.

“Based on an online subscription model, the ePACS service is priced competitively,” says Richard Walker, CEO of Efficient Technology Inc. “From start-to-finish, it is customizable and adaptable to organizations of any size. ePACS value now even greater thanks to the seamless integration of our enterprise forms automation service. Through our partnership with Docupace, we are pleased to provide a real-time, paperless straight-through-process that is cost-effective and easy to use.”

About Docupace Technologies, Inc.

Docupace, a privately-held company based in Los Angeles established in 2002, is an industry leader in delivering SEC/FINRA compliant paperless processing systems to financial services firms. With ePACS®, Docupace allows broker/dealers to connect systems, documents and data seamlessly for cost savings, efficiency and overall better business. Over 300 clients, including some of the largest broker/dealers in the marketplace, are using Docupace and the ePACS solution to streamline their business workflow, store hundreds of millions of documents and make efficient straight-through processing a reality. For more information, **contact Tom Embrogno at 866-582-3713 or visit www.docupace.com**.

About Efficient Technology, Inc.

Founded in 1996, Efficient Technology, Inc. (ETI) creates software services that make it easier to get work done. ETI delivers service through open-architecture platforms and proprietary methodologies that are optimized to streamline and perform paper-based processes online. The result is customer-specific solutions that mirror existing workflows and user behaviors to ensure high adoption rates and maximum cost reductions at a fraction of the current cost and time – solutions that empower people to do their best work while saving money, time and the environment. As the developer of Quik!, the industry-leading standard of enterprise forms automation services, technologies and forms library management, ETI saves the financial industry billions of dollars per year in costs. ETI is proud to be a carbon-negative company saving thousands of trees each year. For more information, **contact Don Cron 877-456-7845 or visit www.EfficientTech.com**.
