



**Digital First.
Print If You Must.**

Evolving From Print-Centric to Digital Client Communications in Financial Services

Regulatory statutes used to require all customer notifications be delivered in print. With the relaxation of these requirements, progressive financial services companies are enhancing customer service, adopting a more environment-friendly profile and improving the bottom line.

EXECUTIVE SUMMARY

A well-established financial service company has been managing client's investments for nearly 60 years. As a company, it's accustomed to the regulation and oversight impacting every financial services business. But as technology has improved, government regulation has relaxed the requirement for paper-only investment notices. Savvy financial services companies recognize the opportunity to provide better service, improve the auditability of information and reduce costs by adopting a "Digital First" approach. IFS deployed a digital-first, print if necessary workflow