



DELIVER HIGHLY RESPONSIVE SERVICE—EVEN AS YOUR BUSINESS GROWS

Your high-net-worth clients are your business. To keep clients happy, you need to be responsive to every new request—whether they want to process a payment, make a time-sensitive investment or simply calculate available funds.

But at the same time, you need ways to...



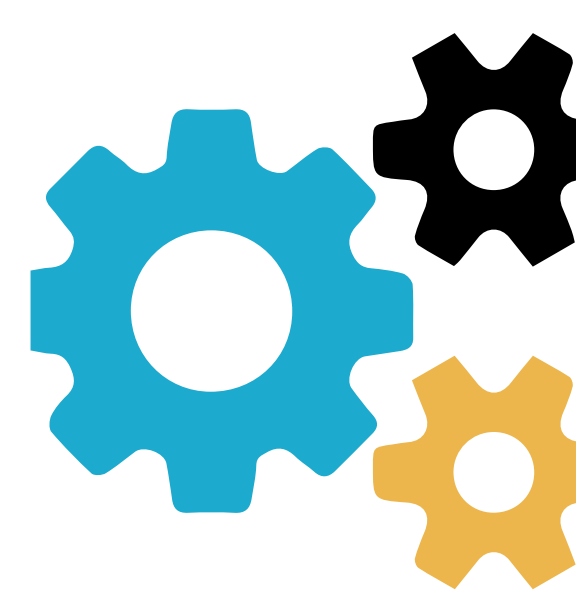
Protect sensitive financial data



Maintain trust and ensure accountability



Scale your services



Enhance operational efficiency

AgilLink by Datafaction can help.

AgilLink is a specialized accounting solution that can help you efficiently provide responsive, personalized business management and family wealth services to your growing list of clients.

Why AgilLink?

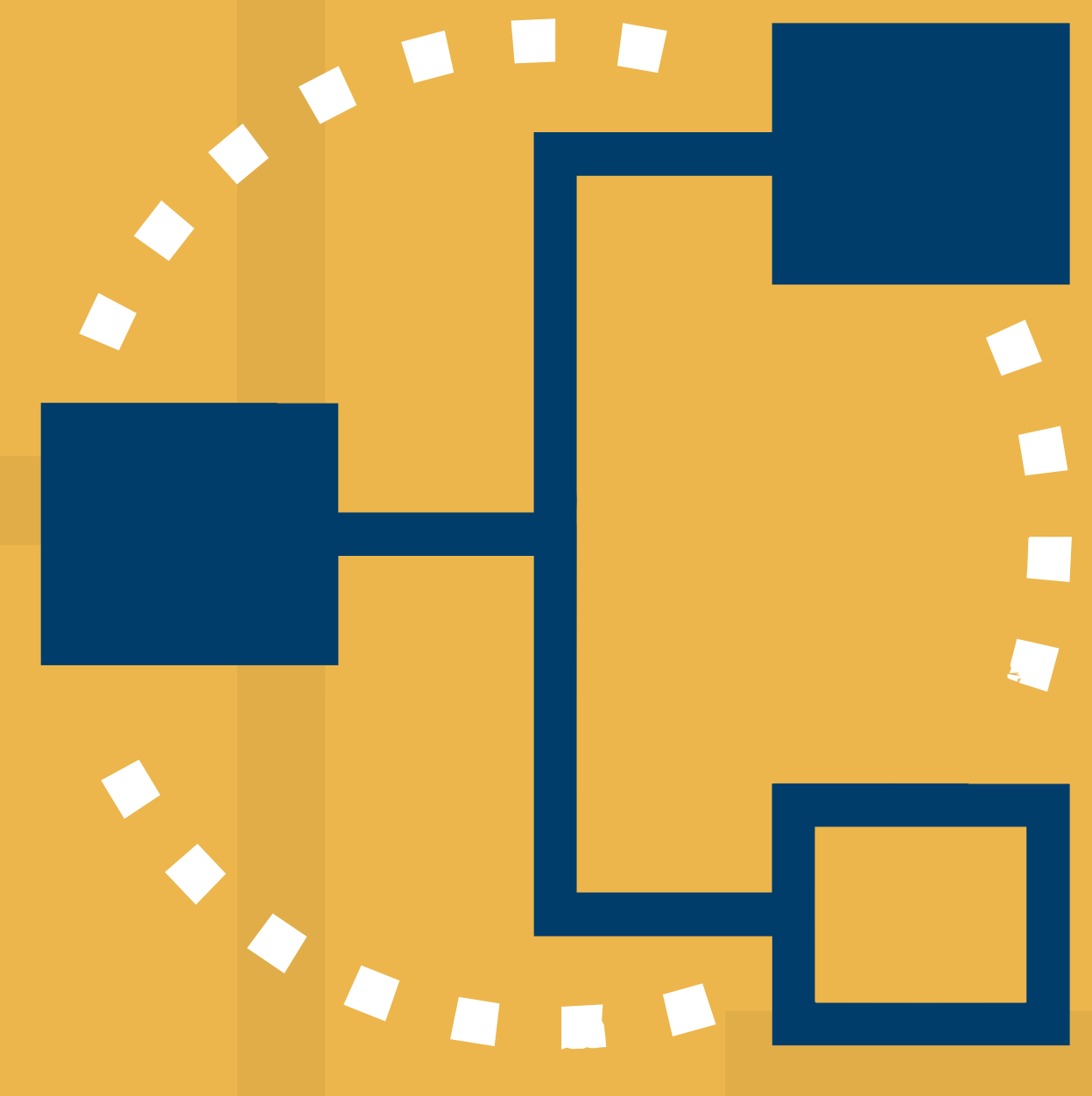


SECURITY

- **SOC compliance** – Adhere to strict service organization control (SOC) regulations
- **Tier 5 data center** – Capitalize on Tier 5 data center security from Switch
- **Data protection** – Safeguard data with backup, redundancy and disaster recovery capabilities

INTERNAL CONTROLS

- **Approval workflows** – Implement trackable internal and external digital payment approvals
- **Auditability** – Establish clear audit trails
- **Role-based security** – Set policies for who can access information



SCALABILITY

- **Multi-entity management** – Support multi-entity clients without complexity
- **Efficient growth** – Scale services without adding personnel costs

EFFICIENCY AND LOWER COSTS

- **No dual entry** – Eliminate dual-transaction entries through City National Bank integration
- **Automation** – Reduce manual work by automating reconciliation and more
- **Single sign-on** – Streamline tasks with single sign-on for accounting, workflow, imaging and banking



Ready to learn more about AgilLink by Datafaction?

Visit: datafaction.com
Contact us: sales@datafaction.com
or (323) 291-5700