

# Intelligent Process Automation (IPA) Solutions for Banking and Financial Services

Digitally Transform Your  
Critical Customer-Facing and  
Back Office Processes



Your clients are your greatest asset, and automation, through digital banking, can help you retain them by improving the customer experience while reducing your operational costs.

## What is digital banking?

Digital banking is the digitalization of banking services and processes to reduce risk, improve efficiency, cut costs, reduce process cycle times, and better serve customers. It allows customers to withdraw money, open new accounts, apply for loans, and make payments online or via their smartphone. The future of banking is here, digitalization of processes is no longer an option for institutions who want to survive - it is a must. Digital Banking is here.

## Intelligent Process Automation (IPA) Capabilities

We have been working in the banking sector, delivering automation solutions since 2006. Some of the best use cases that can be automated are highlighted below.



### Lending

- Loan Origination/Service
- Commercial Lending
- Custody - Mortgage Docs



### Wealth Management

- Payment Processing
- Trade Services
- Trust and Estate Services



### Customer Service

- New Account Opening
- Credit Card Applications
- Call Center Support



### Compliance

- KYC/CDD
- AML
- LIBOR



### Finance

- Accounts Payable
- Accounts Receivable

## About Infoaxis

Document Imaging Group (DIG), a division of Infoaxis is a global leader in Advanced Data Capture and Intelligent Process Automation solutions. Through our state of the art technologies, clients can leverage Conversational AI and Natural Language Processing, Mobile and Advanced Data Capture, Robotic Process Automation (RPA), Analytics and Process Intelligence along with Customer Communications and eSignature under one, cohesive platform that can work independently or in conjunction with existing processes and systems.

Infoaxis, headquartered in Mahwah, NJ, is managed by a seasoned group of executives with extensive experience in advanced automation, systems integration, managed IT, cybersecurity, cloud services & technologies, and business process re-engineering. We partner with the best of breed industry providers such as Kofax, ABBYY, ABBYY Timeline, Cognigy, and Automation Anywhere.

To find out more about Infoaxis' Intelligent Process Automation solutions or our other services and solutions, visit our websites [www.infoaxis.com](http://www.infoaxis.com) or [www.docigroup.com](http://www.docigroup.com).

## Contact Us

Infoaxis, Inc. 300 Route 17 South Mahwah, NJ 07430

Email: [marketing@docigroup.com](mailto:marketing@docigroup.com) | Phone: 201.316.1451

