

## Cabinet NG Simplifies Paperless Compliance for Financial Planners

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### Cabinet NG Simplifies Paperless Compliance for Financial Planners

#### CNG-ONLINE Document Management Helps Financial Advisors Make the Transition to Paperless

Huntsville, AL – March 15, 2010 – Cabinet NG (CNG), provider of document management and workflow software, today responded to the demands of the financial advisory industry's need to streamline office procedures and meet strict SEC and FINRA compliance requirements. A key concern of any financial services business is meeting compliance mandates. With CNG-ONLINE, the hosted version of CNG's award winning document management software called CNG-SAFE, financial advisors, broker-dealers, and independent agents do not have to be concerned with maintaining server hardware or backing up their documents. CNG-ONLINE also provides the necessary tools to control access, enforce document retention policies and audit file activity. Storing files electronically ensures that all files are protected in the event of a disaster, while quick and easy retrieval speeds the regulatory audit process.

CNG-SAFE works with most existing systems and consolidates documents into one organized and secure networked accessible system. In addition to basic filing, storage and retrieval, CNG-SAFE provides enhanced functionality with office applications such as Microsoft Outlook, Intuit QuickBooks, Sage ACT!, Climark Advisor's Assistant, LaserApp, and many others.

#### Important Features of CNG-ONLINE include:

- Filing hierarchy: Every customer has their own unique database and document repository that comes with configurable electronic cabinets that contain customizable folders and tabs; documents filed in the system are associated with a document template which manages document specific variables.
- Templates: document templates streamline the scanning and filing process, helping standardize naming conventions, while managing access rights, retention policies and routing across an organization.
- Scanning: scan directly into CNG-ONLINE using the CNG-SAFE interface or CNG-Batch (included with the system).
- Workflow: streamline document processes and track productivity with manual and rule-based routing of complete folders, bundles of documents or individual documents.

"CNG-ONLINE brings the benefits of comprehensive document management to the financial advisor community without the overhead of upfront and ongoing expense of server software and hardware maintenance," said Andrew Bailey, President, CNG. "Planners who streamline business operations by applying electronic document management and workflow become much more efficient in the way they serve clients. This helps retain existing clients and frees up time to recruit new business. Our hosted solution with complete access rights, workflow, document retention and built-in audit capabilities shows our commitment to meeting the specific needs of the financial community."

For one Idaho-based brokerage firm, the decision to move to a paperless office via CNG-ONLINE was easy.

"We were going through a lot of paper and the fact that documents were not readily available when we needed them made up for a lot of legwork on our end. CNG's platform was so much more efficient and user friendly than what the competition offered," said Scott Mecham, CEO, Sawtooth Securities. "Another system we looked at was much more cumbersome and time consuming to upload and file documents. Our main objective was to get better organized which is why we chose CNG-ONLINE and as a result, the other things like saving paper and saving money just fell into place."

CNG-ONLINE servers are hosted off-site in third-party data centers to insure maximum availability and security. Each

CNG-ONLINE user can access and upload documents via a standard browser or install the CNG-SAFE workstation software on their individual PCs and connect to the hosted CNG-SAFE server with a secure VPN connection. Once connected, the user enters their unique user name and password to access the CNG-SAFE system. CNG customers can also use the CNG-WEB module which provides a web-browser interface to CNG-SAFE. Using this convenient interface, users have the ability to search cabinets, folders, and view documents from any location, anytime, without installing additional software on remote systems.

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Cabinet NG's (CNG) document management software moves manual paper-based processes into efficient electronic workflows. As a result, businesses can increase productivity, reduce paper, save money and meet compliance requirements. CNG's intuitive, secure and affordable filing approach provides a way to achieve a paperless office that scales with business growth. Patent pending integration technology ensures smooth workflow and seamless connection to many existing Windows-based business applications. CNG software supports interdepartmental collaboration allowing users across the company to accomplish tasks more efficiently with centrally managed and instantly accessible documents. CNG also provides industry specific configurations to help industry verticals more quickly attain a paperless environment. For more information, visit [www.cabinetng.com](http://www.cabinetng.com) or [www.cabinetng.com/Blog](http://www.cabinetng.com/Blog).

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