

Peak Brokerage Services Transforms Registered Representative and Client Experiences with Arcus Partners' Finity360

Finity360 is improving the daily lives of Peak Brokerage Services' registered reps and their clients with faster applications, onboarding and transparency

PHILADELPHIA, PA, UNITED STATES, May 2, 2022 /EINPresswire.com/ -- PHILADELPHIA, Penn., May 2, 2022 – Award-winning independent broker-dealer [Peak Brokerage Services](#) has gone live on [Arcus Partners'](#) cloud-based Finity360™ wealth management digital office solutions to enable its growing network of registered representatives to accelerate client onboarding and improve client experiences. [Finity360](#) is a suite of native-Salesforce data and document workflow solutions that helps financial services companies quickly meet their strategic digital objectives and enhance interactions between registered reps, advisors, clients and home offices.



Arcus Partners helps financial services companies – including financial advisors, wealth managers, broker-dealers and FCMs – “Digitize How They Work” by gaining instant access and greater value from their mission-critical data, documents and workflows.

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Arcus Partners helped us to create a sustainable, scalable digital strategy that improves the lives of advisors and their clients.”

*Scott Whitten, CLU® & COO,
Peak Brokerage Services*

Scott Whitten, CLU® and Chief Operating Officer at Peak Brokerage Services, LLC, said: “With its deep knowledge of technology and operations within the financial services industry, Arcus Partners helped us to create a sustainable, scalable digital strategy that improves the lives of advisors and their clients. Our successful rollout of Finity360 has dramatically improved reps’ day-to-day efficiencies, client service and growth capabilities while enabling us to maximize our IT and operations investments and add more value for years to come.”

Nearly 80% of American consumers say that speed, convenience, knowledgeable help, and friendly service are the most important elements of a positive customer experience, according to a recent PwC report. Yet, many companies are still not increasing their investments in digital technologies that help deliver better experiences. A KPMG report said that, between 2017 and 2020, digitally mature organizations delivered 25% higher revenue, 31% higher EBITDA and 11% higher net promoter scores than less digital competitors.

Many financial services firms struggle with legacy technology stacks, existing paper-based workflows, and disparate databases which make it difficult for firms to connect process workflows that are driven by data contained in forms and documents. Adding to the challenge is the need for firms to manage multiple sets of entitlements and relinquish data control and governance to a chosen technology vendor.

Gerry Murphy, CEO of Arcus Partners, said: "In speaking with advisory firms across the wealth industry, we have found they face similar problems despite technology adoption: disparate data, disconnected processes, and a lack of control over their own data. By the nature of its roots in data management and cloud-based design, Finity360 solves these problems by simplifying how business process workflows link together to provide one consistent experience, giving firms full ownership and control of their data, and providing them with the data intelligence they need to drive their businesses forward."

Peak Brokerage Services implemented the following Finity360 digital office solutions:

- Finity360 Forms – a natural language form (NFM) tool that provides simpler and more efficient applications and onboarding, and eliminates instances of documents "not in good order" (NIGO)
- Finity360 Docs – a blockchain-enabled document management app that uses AWS FINRA-compliant storage and AI technology to provide a better, automated way of organizing, capturing, digitizing, approving and completing tasks involving business files and documents
- Finity360 Recovery – a backup and recovery tool that reduces the time and cost of data recovery

Registered Representatives ranked Peak Brokerage Services #1 in the 2020

WealthManagement.com independent broker-dealer report card, won 2021

WealthManagement.com's "Wealthies" and ThinkAdvisor awards for Practice Management, Social Media, Thought Leadership and Education, and received other key industry awards in recent years.

About Arcus Partners

Arcus Partners helps financial services companies – including financial advisors, wealth managers, broker-dealers and FCMs – "Digitize How They Work" by gaining instant access and

greater value from their mission-critical data which is often locked up in back-office or CRM platforms. The company's cloud-based, digital data and document management solutions, system integration, and Salesforce.com automation services help firms increase operational efficiencies by maximizing the functionality and utilization of their CRM and back-office systems. With more than 30 years of experience in capital markets, securities back-office operations, data aggregation, and system integration, Arcus Partners' Finity360 digital office solutions provide financial institutions with a highly agile, scalable and customizable way of gaining maximum business value from their data, systems, documents, and operations workflows. For more information, visit <https://www.arcuspartners.com>.

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