

Arcus Partners Announces Integration and Reseller agreement with Quik! Forms for Wealth Management, RIA, and BD Firms

Arcus Announces Finity360 FORMS Plus: Seamlessly Integrating Quik! Forms Libraries into a native Salesforce Solution for Wealth Management, RIA, and BD Firms



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EINPresswire.com/ -- Arcus Partners is

excited to announce a strategic integration and reseller partnership with [Quik!](#). This collaboration integrates the Quik! forms libraries into Finity360 FORMS Plus™, part of Arcus' native Salesforce suite of middle-office applications designed for SME Wealth Management, Registered Investment Advisors (RIAs), and Broker-Dealer (BD) firms using Salesforce Financial Services Cloud (FSC) and all other Salesforce license types.

By integrating Quik! into Finity360™, users gain access to a streamlined, intelligent forms solution that simplifies and accelerates the processing of client documents with any custodian.

This solution automates form completion, ensures accuracy by leveraging existing client data, and manages submission workflows, reducing manual entry and eliminating NIGOS. With a central hub for all form-related tasks, including real-time status tracking and updates, the solution significantly reduces time and effort for advisors and operations teams, resulting in a smoother, more efficient client onboarding and service experience.

Gerry Murphy, CEO of Arcus Partners, expressed his enthusiasm for the partnership: "We are thrilled to be a reseller and integration partner of Quik!. By incorporating Quik! into Finity360™, we provide a comprehensive solution that specifically addresses the complex needs of Wealth Management, RIA, and Broker-Dealer firms. This collaboration demonstrates our shared commitment to innovation, delivering solutions that enhance efficiency, data security, and user experience for our clients."

Key benefits of the integration include:

- Seamless Native Salesforce Integration: Quik! is directly integrated into Finity360, providing a

smooth and intuitive user experience within the Salesforce ecosystem.

- Customizable for Different Custodians: Tailor account opening processes to meet the unique needs of various custodians, ensuring adaptability and efficiency.
- Enhanced Business Process Automation: Simplifies data entry and account setup, allowing firms to focus on their core business.
- User-Friendly Interface: Designed for a seamless user experience, making adoption easy for firms.
- Compliance and Data Security: Features robust data protection to meet the stringent security needs of financial services firms.
- Scalability and Flexibility: Designed to scale with the growth of SMEs in the wealth management, RIA, and BD markets.
- Electronic Signature Enabled – complete integration to electronic signature providers.

Richard Walker, CEO of Quik!, added: “We’re excited to partner with Arcus Partners to help bring an amazing solution to the wealth management community. Integrating Quik! into Finity360™ empowers financial professionals with the tools they need to streamline operations and focus on delivering value to their clients.”

David Melendy, COO and Managing Director at Silver Oak Securities, stated: “The integration of Quik! into Finity360™ has transformed how we manage multi-custodian account opening processes. The streamlined workflow and seamless experience have significantly improved our operational efficiency, enabling us to better serve our clients while maintaining compliance and data security.”

For more information about Finity360 FORMS Plus™ and how it can transform your firm's data management capabilities, please visit <https://www.arcuspartners.com>.

About Arcus Partners

Arcus Partners delivers innovative middle-office solutions for Wealth Management, RIA, and BD firms through Finity360™, a native Salesforce suite of applications designed to optimize business processes and system integrations. Arcus’ solutions help enhance operational efficiency, data management, and compliance.

About Quik!

Quik! is a leader in providing digital forms and data automation solutions that simplify complex business processes for financial services firms. Through innovative technology, Quik! helps firms optimize data handling and streamline client onboarding.

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