



JFS Wealth Advisors
Financial Management
And Services

AT A GLANCE:

>> Company:

JFS Wealth Advisors

>> Location:

Hermitage, PA with additional offices in Pennsylvania and Florida

>> Industry:

Financial Management and Related Services

>> Business Challenge:

1. Go Paperless,
2. Enable Anywhere, Any-time Information Access,
3. Link solution to Major 3rd Party Software Apps.

>> Solution:

Install CNG-SAFE to consolidate all data into an organized and easy-to-use information repository

>> Results:

Improved business processes by applying automated workflows and maximized office space by eliminating unnecessary physical documents. Plus, Cabinet NG User Conferences prove both fun and informative!

JFS deploys CNG-SAFE and receives a wealth of business benefits

Intuitive electronic file cabinet concept yields more productive and efficient business processes

Financial services firm looks to Cabinet NG to go paperless and support growth

JFS Wealth Advisors, a Registered Investment Advisor, offers comprehensive private wealth management services including personal financial and estate planning, investment management, tax planning and return preparation for individuals, families, fiduciaries, and institutions. JFS started using its Cabinet NG Shared Access Filing Environment (CNG-SAFE) solution in 2004. Today all employees use CNG-SAFE.

The 24 employee firm saw the need to free up space for more productive purposes than paper files in rows of filing cabinets. JFS, like many small-to-mid-sized businesses,

wanted to go paperless in order to achieve the efficiency and productivity gains available from a cutting edge technology solution that would cut down on paper use, filing and storage throughout the firm.

Also in common with the needs of growing companies, JFS wanted a document management solution that everyone in the firm, in all locations – branch office, or on the road – could easily learn to use and access.

Finally, JFS had a question for Cabinet NG: was it possible to link CNG-SAFE to a major software application in use at the firm? JFS's goal was to eliminate the errors and re-

source waste that often occurred when different software programs made use of the same information. In JFS's case, the firm wanted to avoid keying the same customer information in both CNG-SAFE and ACT!,

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Laura Blaire, JFS Wealth Advisors Administrative Officer

the popular contact and customer management solution application from Sage.

Job Number 1: Clearing out the paper

When JFS decided to go with Cabinet NG, they received a client/server document management repository software system that drastically reduced paper files. The most visible benefit of CNG-SAFE has been the maximization of physical workspace at JFS. By year end 2007, the firm will have 5 physical file cabinets in use, most of which will be used to satisfy regulations requiring that certain documents be retained in paper form. As Laura Blaire, JFS Wealth Advisors Administrative Officer says, "Walking into that half empty room formerly full of paper-filled filing cabinets gives me a huge sense of satisfaction and demonstrates in a tangible way to everyone how much value Cabinet NG adds to JFS Wealth Advisors."

Making client folders available to all employees, anywhere, anytime

Cabinet NG allowed JFS to make all files—both client and internal—instantly and simultaneously available electronically, which has been, in Laura Blaire's words, "invaluable". The major disadvantages of paper files (lost, mis-placed and incorrect client information and documentation) are completely avoided with CNG-SAFE in place. The centralized, scaleable electronic document management solution makes information-sharing secure and convenient, and adds considerably to productivity when no-one has to do the rounds to find misplaced or in-use files.

Secure access and defined capabilities at the cabinet, folder and file level

CNG-Safe's security and access features gave JFS the flexibility it needed. All JFS employees are able to view prospect and other client cabinets, as well as create files, a choice made by the firm as CNG-SAFE was rolled out com-

pany-wide. As employee familiarity with the CNG-SAFE system grew, individual users were given delete rights. JFS is also able to control user access and deletion rights at the document, folder and/or cabinet levels using Cabinet NG's security and document class features. This ensures any SEC documentation needed for audit and other regulatory purposes is properly maintained which makes compliance both efficient and secure.

Cabinet NG's ability to flexibly accommodate the unique business needs and administrative processes of customers is demonstrated by JFS's use of groups to define access parameters to individual cabinets and files. Laura Blaire noted how her use of groups to assign access rights was a convenient and effective way to ensure the entire firm standardized its document management processes on CNG-SAFE in an efficient and appropriate manner.

Hand in hand with securing documents comes the need to protect documents from disaster. As a compliance officer, Laura Blaire said she felt safer having a good data backup of the CNG-SAFE central information repository, which was far easier to safeguard than rows of physical file cabinets.

"Cabinet NG technical support has been able to answer questions and resolve issues in real time. Even when further research or programming is necessary, we always get timely resolution and quality service."

Laura Blaire, JFS Wealth Advisors
Administrative Officer

Plug-in for ACT! interface unites document and contact management

JFS maintains an active ACT! database of all its clients. JFS's challenge with ACT!, as in the case of all its major software applications, was to ensure errors were minimized as the firm's use of major software applications increased.

Laura Blaire noted that Cabinet NG worked diligently to ensure JFS's ACT! implementation worked with CNG-SAFE. Cabinet NG's plug-in for ACT! provides a seamless connection that merges ACT! contact field data into CNG-SAFE. ACT! fields are automatically sent to Cabinet NG to populate folder data, which creates a flawless flow of information between two of JFS's most significant software applications. Users can view documents filed in CNG-SAFE directly from within ACT! or launch the CNG-SAFE application for additional document management functionality.

JFS received one-step customer/contact and document management. Data entry requirements were substantially reduced, and filing and finding documents became quicker and easier.

Cabinet NG enables the seamless integration of CNG-SAFE with major third-party business applications, including ACT!, MS Outlook, Advisors Assistant and other software packages. According to Blaire, "With Cabinet NG, our ACT! users can be productive by accessing client folders filed in CNG-SAFE directly from within the ACT! application."

"A true partnership"

Cabinet NG's training and sales/support has enabled JFS to tailor CNG-SAFE to the firm's unique needs and business model. Laura Blaire noted that Cabinet NG has always been willing to respond to her firm's questions and needs, and points to the Cabinet NG User Conferences as an excellent resource. She found getting to know the support professionals in person increased her understanding and usage of CNG-SAFE, in addition to allowing her firm to fully maximize the software's ability to make JFS more efficient, productive and client-focused. Laura Blaire said that Cabinet NG conferences were both lively and informative, and that she and other clients appreciated the hands-on interaction of Cabinet NG's President, Andrew Bailey.

JFS came to the Cabinet NG User Conference with a "wish list", as all participants are encouraged to do – and found that the list resulted in individual time slots with programmers that established a personal working relationship in use at JFS since the conference. Blaire noted, "Cabinet NG technical support has been able to answer questions and resolve issues in real time. Even when further research or programming is necessary, we always get timely resolution and quality service." As well, JFS was able to work on implementing specific enhancements discussed at the conference with Cabinet NG after the conference.

Finally, JFS credits Cabinet NG with adding to their ability to provide quality customer service. The firm can access a client file anywhere, pull it up and handle any client request quickly and easily. This helps relationship managers stay competitive and service clients to the fullest.

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