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Docupace Technologies, Inc. Hires Impact Communications as Agency of Record

Privately-held Company Quickly Gaining Market Share, “Out to Change the World”

LOS ANGELES, August 31, 2012 – Docupace Technologies, Inc., an industry leader in providing SEC/FINRA-compliant paperless processing systems for financial services firms, today announced that it has hired Impact Communications as PR agency of record. Docupace engaged the Kansas City-based marketing communications firm to help tell its story to the financial services industry. In addition to shaping and sharing the Docupace story, Impact Communications will provide conference consulting, message development, media training and website consulting.

“Docupace is leading initiatives that are moving the needle in terms of providing SEC/FINRA-compliant and environmentally friendly processing systems for the financial services industry,” said Docupace Executive Vice President Tom Embrogno. “Frankly, we’re out to change the world. We work hard for our clients, but really don’t have time to toot our own horn. However, what we are doing is so vital to the well-being of advisory firms and the investing public they serve, that I always felt a little remiss in our obligation to shine a light on our work. I realized we needed a marketing communications firm to help us broadly tell our story. We think Impact Communications is the right firm for the job.”

Docupace is embedded inside numerous enterprise-wide workflow systems. For instance, Cetera (one of the largest broker/dealer networks in the nation) uses the Docupace solution to provide paperless processing, compliant electronic signatures and straight-through processing to its representatives. Docupace also offers solutions for RIAs who are responsible for their own technological solutions.

Docupace has recently formed partnerships with and is providing services for:

- Dallas-based **Williams Financial Group, one of the fastest growing broker/dealers in the country**, to provide a cloud-based, automated workflow solution with no upfront charges for new hardware. “True straight-through processing—starting the process in the field with secure electronic signatures and the ability to virtually plug a document into the approval system—is both a huge benefit for WFG’s existing field, and an attractive proposition for new recruits,” Embrogno said.
- Dallas-based **1st Global, the largest independently owned wealth management partner for accounting and legal firms**, to deploy a complete paperless office solution for the firm and its more than 500 affiliated tax-centric wealth management firms. “Docupace Technologies, through its ePACS® workflow capabilities now supports the vast majority of 1st Global’s core infrastructure processes,” explained Docupace Executive Vice President Tom Embrogno. “It is pre-integrated with all the sub-systems necessary to move any piece of

business through the firm. ePACS® is distributed so that field users and home-office users are virtually connected and experience the same functionality.”

- Montpelier, Vt.-based **Equity Services, Inc., a broker/dealer and registered investment advisor affiliate of National Life Insurance Company**, which has engaged Docupace to provide straight-through, streamlined processing capabilities for its broker/dealer business. “Our representatives have been asking for a paperless office solution, and we were actively seeking ways to streamline our business and improve back office efficiency,” said Lance Reihl, President of Equity Services, Inc. “We went through a process of defining our own firm’s needs, and then went to the marketplace in search of a solution. We were surprised to find that most of the available solutions only addressed a portion of our needs. ePACS®, provided by Docupace, was the most complete solution in the marketplace.”
- Palm Beach Gardens, Fla.-based **The Legend Group, a subsidiary of Waddell and Reed Financial, Inc.**, to offer access to an industry-leading platform for electronic forms and client data integration to its affiliated advisors. “We are excited that Docupace is able to integrate electronic forms, electronic signatures and Customer Relationship Management software into one engine that makes it easy for clients to conduct business with us,” said Mike Hamm, Senior Vice President with The Legend Group.
- Los Angeles-based **Efficient Technology, Inc., an industry leader in forms-based workflow automation and document management**, to offer turnkey, straight-through-processing solutions to advisors through institutional relationships with some of the nation’s largest independent broker/dealers, clearing firms and custodians. “Through our partnership with Docupace, we are pleased to provide a real-time, paperless straight-through-process that is cost-effective and easy to use,” said Richard Walker, CEO of Efficient Technology Inc.

“Additional big-deal partnerships are in the works, and will be announced soon, said Embrogno. “We’re excited about all the calls and conversations we’re having now.”

About Docupace Technologies, Inc.

Docupace Technologies, Inc., is a privately-held company based in Los Angeles. Established in 2002 and quickly gaining market share, the company is an industry leader in delivering SEC/FINRA compliant paperless processing systems to financial services firms. With ePACS®, Docupace allows broker/dealers to connect systems, documents and data seamlessly for cost savings, efficiency and overall better business. Over 300 clients, including some of the largest broker/dealers in the marketplace, are using Docupace and the ePACS solution to streamline their business workflow, store hundreds of millions of documents and make efficient straight-through processing a reality. For more information, visit www.docupace.com.

About Impact Communications, Inc.

Founded by industry veteran Marie Swift in 1993, Impact Communications specializes in developing effective client communications and marketing strategies for a select group of highly successful financial advisors and allied institutions. Widely respected as a marketing professional with a loyal following, Swift, along with her team, works with independent advisors and select institutions to increase both visibility and credibility within their niche markets. In addition to marketing strategy and media promotions, the firm offers clients graphic design services, content creation, book publishing services, and executive coaching. For more information visit www.impactcommunications.org.

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