



Say goodbye to paper forms
and manual signatures



Make digital form-filling easy. Complete, sign and submit any form you need online with dpInk.

Hundreds of legal documents and other forms are used in everyday investment management activities. Each must be created, filled out and signed. Often they are printed and posted, or scanned and emailed. The process is laborious, expensive, wasteful and error-strewn. dpInk automates and digitalises that effort.

Everyone gains

dpInk benefits everyone: investors enjoy easier, more responsive interactions with their service providers, while fund administrators and investment managers reduce costs and workloads.

- **Populate, digitally sign, submit, review and approve** any type of form for any purpose. Fields are pre-populated where stored data is available to increase data accuracy and minimise completion time.
- **Fast, transparent and secure** online form completions ease client onboarding and capital raising steps, saving time while enabling more targeted approaches to boost sign-up.
- **Customisable workflows** allow staff to specify form completion rules, view submitted forms, attach documents where required and post comments to expedite processing.
- **Management dashboard** provides full visibility of the entire form completion process, minimising errors and bottlenecks.
- **Automatically create and update records** in the transfer agency system with seamless data extraction from completed forms.

dpInk is an optional-add on to the dp360 online portal. With dpInk, users can complete and digitally sign any form a firm wants to create, including:

- Subscriptions
- Redemptions
- Address updates
- Change of bank details
- Tax declarations

Fast, smooth, controlled

Replace:

- slow, error-prone manual form delivery and completion with fast, efficient digital interactions carried out when users want.
- forgeable manual and e-signatures with secure, immediately-enacted, legally-binding digital ones.
- ad hoc processing steps with structured workflows to ensure forms are completed correctly and any necessary supporting documentation is in place.
- disconnected fundraising efforts with customisable investor invitations, online forms and supporting information to create a proactive, managed approach.
- form completion blind spots with transparent oversight of all your forms and their processing status.

Your needs. Our solution.

Form-filling is integral to almost every investment management activity. dpInk revolutionises traditional processes to create fast, hassle-free experiences for clients, managers and administrators.



Easy online form completion

Challenge: Manually creating, filling out and signing each of the (often paper) documents firms need in their daily activities is laborious, error-prone, expensive and wasteful.

dpInk solution: Through the dp360 web portal, users have on-demand access to the forms they need for every stage in the investor lifecycle. dpInk allows the forms to be completed, digitally signed, submitted, reviewed and approved online. Fields are automatically pre-populated with stored investor data where available to minimise completion time and mistakes.

User benefit:

Form completion becomes fast, transparent and secure. Investor effort is minimised, while fund administrators and investment managers cut their costs and workloads.



Increase operating efficiencies with flexible, automated workflows

Challenge: Manual form-filling is haphazard. Errors are common, requiring back-and-forth interactions that can be both a drain on resources and a source of frustration for customers.

dpInk solution: Structured workflows that can be customised to each organisation's needs allow firms to control how users complete every form, creating an easy-to-follow, one-time process. The workflows can stipulate who can review/approve a form, and flag any additional document requirements to ensure all relevant supporting information is submitted. Staff can post comments at the different workflow stages to accelerate processing. Review protocols ensure maximum accuracy and efficiency.

User benefit:

Workflows ensure forms are completed correctly and any necessary supporting documentation is in place, minimising errors and bottlenecks.



Security and speed with legally-binding digital signatures

Challenge: Manual signatures on paper forms and e-signatures on electronic documents are easily forgeable, creating trust and fraud vulnerability issues. Sending documents via post or email also brings security risks.

dpInk solution: dpInk leverages digital signatures – certificate-based digital IDs that guarantee the authenticity of a signature and are legally binding. And because documents and any attachments can be exchanged via the secure dp360 portal, the security weaknesses associated with mail and email are removed.

User benefit:

Signing forms digitally speeds up completion times and maximises security.



End-to-end dashboard overview

Challenge: Investment managers and administrators lack an up-to-date picture of which forms are being completed, by whom and where they are in the process. Firms don't know if a prospect will open an account, if a client's tax status has been updated, who will subscribe to a fund, how much capital they will commit or what redemption requests are looming.

dpInk solution: The management dashboard provides real-time visibility into the end-to-end form completion process. It tracks which forms have been created, viewed and submitted, by whom, their processing status and next steps.

User benefit:

Oversight of form processing statuses allows firms to better plan and proactively manage their business. Fundraising efforts can be enhanced, client support improved and surprise action minimised.



Create and update records automatically

Challenge: Information contained on completed forms must be transferred to the appropriate system(s), typically via manual input. The work is laborious, with a high risk that data is transposed incorrectly.

dpInk solution: Automated links to back-end administration systems allow data to be extracted from completed forms at the click of a button, enabling records to be automatically created and updated in Deep Pool's transfer agency system without manual intervention.

User benefit:

Data entered on online forms is captured in downstream systems accurately, while saving staff from mundane, low-value inputting tasks.



**Automate the processes
most important to you**

Discover how **dplnk** can
transform your business.

About Deep Pool

Deep Pool is the #1 investor servicing and compliance solutions supplier, providing cutting-edge software and consulting services to the world's leading fund administrators and asset managers. Our flexible solution suite, developed by an experienced team of accountants, business analysts and software engineers, supports offshore and onshore hedge funds, partnerships, private equity vehicles, retail funds and regulated financial firms. Deep Pool is a global organisation with offices in Dublin, Ireland, the United States, the Cayman Islands and Slovakia. For more information, visit: www.deep-pool.com.

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