

Financial Services

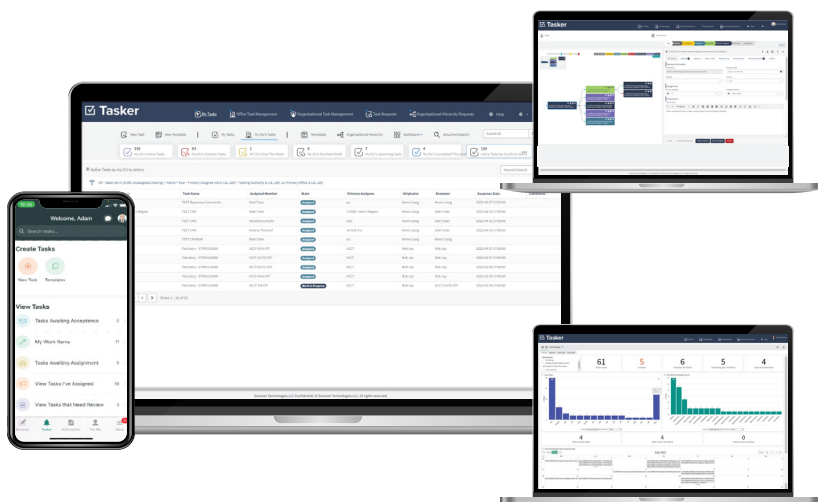
Streamlining Banking and Insurance to Drive Growth and Value



The increasing demand to meet customer needs with regulatory pressures and growing competition has led financial institutions to rely on innovative technology solutions to help transform their businesses, reduce costs, and increase customer satisfaction. With Tasker, industry leaders leverage the most secure collaborative work management solution to eliminate the silos of legacy tools and manual solutions. Leveraging the flexibility of Tasker shifts organizations from the rigid constraints of workflow into the nimble and dynamic flexibility of TaskFlow™. The result: new found efficiencies delivering services while accelerating growth and profits.

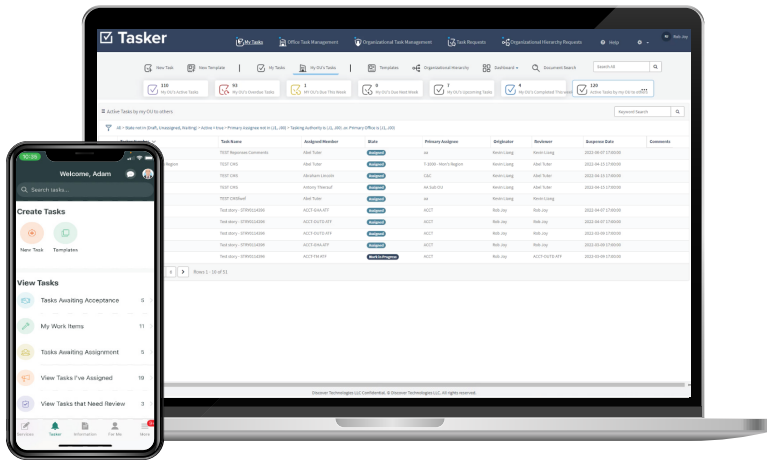
COMMON APPLICATIONS

- Bank Workflow Management
- KYC Processes
- Account Openings and Closings
- New Customer Onboarding
- Account Approvals
- Account Welcome Correspondence
- Loan Applications, Documentation, eSignature, Storage
- Loan Forgiveness and Modifications
- ACH Stop Payment Processing
- Fraud Processing
- Regulation D Violation Letter Processing
- Report & Letter Generation and Processing
- Budget Approvals
- Invoice Management
- Safe Deposit Operations
- Cybersecurity Operations
- Sales Processes
- Underwriting
- Claims Processing
- First-Notice-of-Loss (FNOL)
- Appraisals
- Adjustments
- Settlements





Built for Today's Technology-Forward Financial Leaders in Banking, Insurance, and Wealth Management

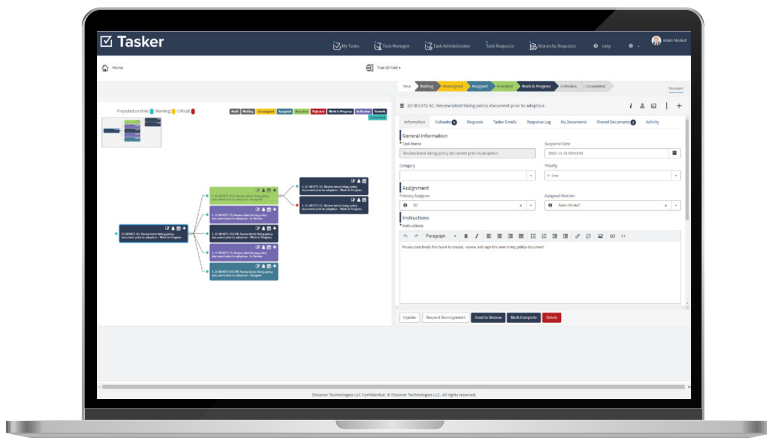
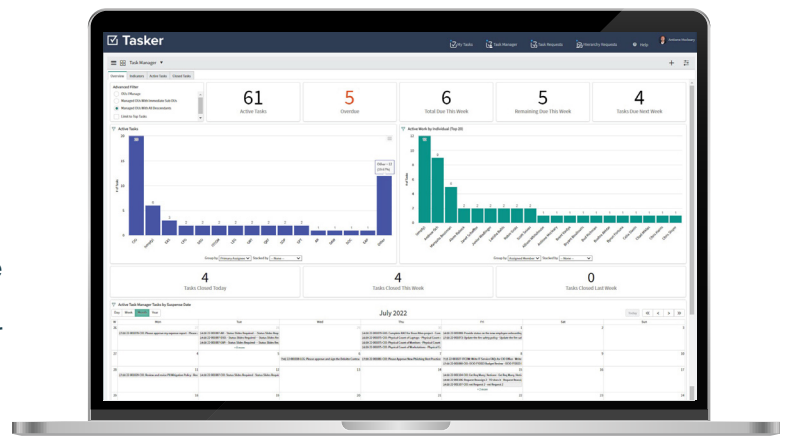


WorkUI™

Manage your work easily all in one place with the Tasker WorkUI™. Designed with collaborative work management best practices in mind so your critical, ad-hoc, and routine work is completed regardless of location or device. Quickly find all your assigned and delegated tasks, projects, and work. Access each assignment and all attachments, approve, complete, or delegate with ease.

Reports & Dashboards

Robust and dynamic standard and custom dashboards capture the state of work being performed throughout the organization. Executives can review organizational performance while business unit and team leaders can see who is getting work done and where bottlenecks are impacting productivity. All dashboard data can be easily exported in one-click to .csv and .xlsx formats for further analysis or review.



Intuitive TaskFlow™ Builder

Easily build complex tasks and projects using Tasker's unique TaskFlow Builder. Build and review templates in "task-tree views." Quickly make tasks and subtasks, adjust assignments, or make ad-hoc changes on the fly to adjust for unexpected challenges or staff turnover. The flexibility and proactive features of Tasker ensure work is completed and nothing is lost when changes impact the market, business, or workforce.