

## tru Independence invests in PhantomPDF to help wealth management firm clients

tru independence

### Agents of independence for RIAs

When RIAs want to leave big firms and go independent, they turn to tru Independence to put together systems, platforms and tools for them to grow their businesses. That includes the full technology stack that tru offers, with all of the financial tech applications and tech support in a private cloud environment. Tru manages their clients' tech needs, including keeping all software up to date.

Yet tru realized they needed to do the same with their PDF software. "A platform migration really forced our hand," says Paul Dalton, Chief Technology Officer. "We ran into technical challenges as we migrated from a Citrix Zen app environment to run more traditional local apps with a cloud backend. We needed to get everybody on the same page."

### The goal: application standardization

When working with PDF files, tru used outdated versions of Acrobat Pro 9 installed locally across their user base. "We knew we needed to come up with a different option that would satisfy all of our clients," adds Dalton. "Pretty much every person in every office is a power user, so they all need full PDF editing capabilities. A reader just wouldn't cut it."

### Evaluating the PDF players

As tru evaluated different vendors, they eliminated Acrobat because Adobe's licensing would have meant a 500% increase in cost, which was prohibitive. They also looked at Nitro PDF, Soda PDF and others but they were all quickly eliminated for one reason or another, whether it be missing features, insufficient data security, or licensing issues.

### A PDF solution that helps free RIAs to go independent

For registered investment advisors (RIAs) looking to split off from big brokerage firms, tru Independence provides soup-to-nuts services. They help RIAs find office space, hire staff, and launch with services like transition intelligence, corporate structure design, note repayment solutions, transition assistance, talent acquisition, practice management, and more. Along with these services, tru offers an open architecture platform that provides RIAs with a full suite of business services needed to operate independently. When it was time for tru to update their PDF solution to keep momentum on their digital first initiative, they chose PhantomPDF software.

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Then they reviewed Foxit PhantomPDF and things began to fall into place. “Foxit gave us a licensing model that worked and was all within budget,” Dalton explains. “It’s a flexible model. If Client A leaves and we recover five licenses, we can assign them to Client B.” Yet while licensing was paramount, it was the full-featured editing capabilities that PhantomPDF offers that really won over the tru team.

## Familiar look and feel

The ribbon interface in PhantomPDF meant tru users immediately felt at home with its familiar, Microsoft Office-style look. “Our users’ feedback is that the interface is so much easier than Acrobat,” adds Dalton. “It meant we could roll out without a ton of training.”

## Ease of creating forms

Form creation in Acrobat had required tru’s support team to assist users at every level in the company. “Our chief compliance officer did not have the easiest time making forms in Acrobat,” Dalton explains. “So when she came to me after trying PhantomPDF and said ‘Hey, this is awesome. I can do this without having to call you,’ that was huge.”

## World-class support

Foxit is well-known for responsive technical support among its customers, who give them high marks, time and time again. tru independence is no exception. “We haven’t had to lean on Foxit support a lot but when we do, they’ve been great,” says Dalton. “With Adobe, it was more like ‘get in line and we’ll get to you when we get to you.’”

## Strong integration

Integrating with the current software stack that a client base has helped sell tru on PhantomPDF. “We were pretty excited to see DocuSign and Microsoft Office integration,” Dalton comments. “That’s paving the way for some important future initiatives.”

## Streamlining new account creation increases customer satisfaction

As tru moves further toward their digital initiative, they intend on PhantomPDF helping digitize business processes that are currently paper-based. “Opening new accounts is still a manual activity,” adds Dalton. “Clients fill out paper documents, scan them, upload them to DocuSign, then send them to their clients. We’re excited to go straight

from an electronic document through DocuSign with PhantomPDF to get documents out the door faster.”

## Finding information quickly speeds up workflow

As tru clients perform OCR on the large quantity of paper documents that come back to them, using PhantomPDF, they’re immediately creating searchable PDF files—a workflow benefit for organizations that constantly reuse documents. “We can do full text searches on files in our repository,” Dalton explains. “That means we can find those documents at a moment’s notice when they’re needed. This is a game changer.”

## Staying in compliance every step of the way

Adding, deleting, moving and reusing pages may seem rudimentary but it’s a feature set that tru clients use heavily. They need to create these documents easily and know that they’re secure. “Our users combine pages from different documents to create new documents hundreds of times a day,” as Dalton says. “Because we’re under regulatory oversight by SEC and FINRA, lots of attention is paid to accuracy and data security. We rely on Foxit’s advanced tools not only to create documents quickly but also to share them securely.”

## A solution that delivers

All in all, the tru team is extremely pleased to have moved to PhantomPDF. “The product checked all of our boxes,” Dalton finishes. “The rollout went well and we’ve had really positive feedback from users. We’re in it for the long haul with Foxit.”

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