# Completing and Distributing Financial Forms Digitally

HSI Trust switched to PDFfiller's digital solution to complete & distribute forms faster than ever

# Who?

Since 2009, HSI Trust, LTD. has been helping clients take back control of their finances, working "primarily in situations where [clients] are having difficulty with their mortgage, but also student loans, credit cards, anything on the financial side," said Bruce Boguslav, Executive Director of the organization.

Because HSI Trust works in the field of non-profit consumer advocacy to assist individuals across the country, "We don't sell product, we just work with [clients] to either negotiate with their lender or various things like that," Boguslav said.

Featured on ABC's World News Tonight and Nightline as well as in the Huffington Post, HSI Trust are experts in their field and serve customers across the country. With such wide outreach, massive demand for their services, and the need to process and distribute huge numbers of financial documents, HSI Trust needed an effective digital document management solution to streamline their workflow.

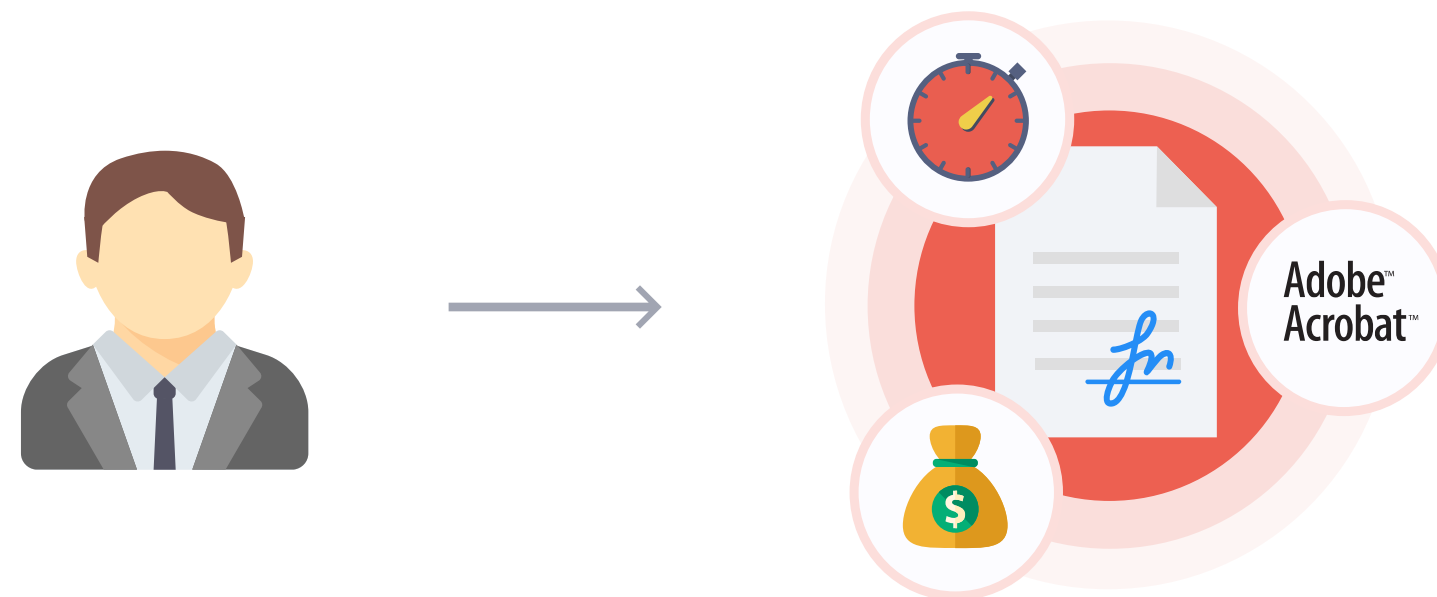*HSI Trust featured on ABC's World News Tonight & Huffington Post*

# The Problem

Working in the financial space, Boguslav and his team at HSI Trust needed an efficient digital document management solution that was simple, quick, and cost-effective.

Because they are helping to solve a range of financial issues for clients across the country, HSI Trust works with hundreds of different forms. "We're dealing with various types of forms for submission," said Boguslav. "There's a gazillion, depending on what the issue is... We've got our own that we use to gather information with our clients, some basic financial [forms], then there's some additional paperwork that goes with very specific [financial situations]... Some come in fax; some come in all different formats."

Before PDFfiller, forms came in various formats and were difficult to distribute, manage, complete, store and return. Boguslav knew that he needed a digital solution, but couldn't find an adequate tool for the job.

 "We were using different PDF [tools] – we have an older version of Acrobat we're using occasionally. We've also tried something called CutePDF. We've been through a couple different tools. Yeah, in some cases- we've been doing this since 2006- earlier, we were literally doing cut and paste. Or you'd [have to] scan it four times," Boguslav said.

Before switching to PDFfiller, HSI Trust struggled with the complex feature set of Adobe Acrobat. Expensive and clumsy, Acrobat was a less than perfect solution.  So too were other online PDF tools which did not provide the same ease-of-use features and functionality as PDFfiller.  An analog, paper-based solution was inadequate – being too slow, time-consuming, and personnel dependent.

But then HSI Trust found PDFfiller.  "After struggling with some of the other tools and then looking at Acrobat and the cost of upgrading, we just decided to try [PDFfiller]. It works!" said Boguslav.
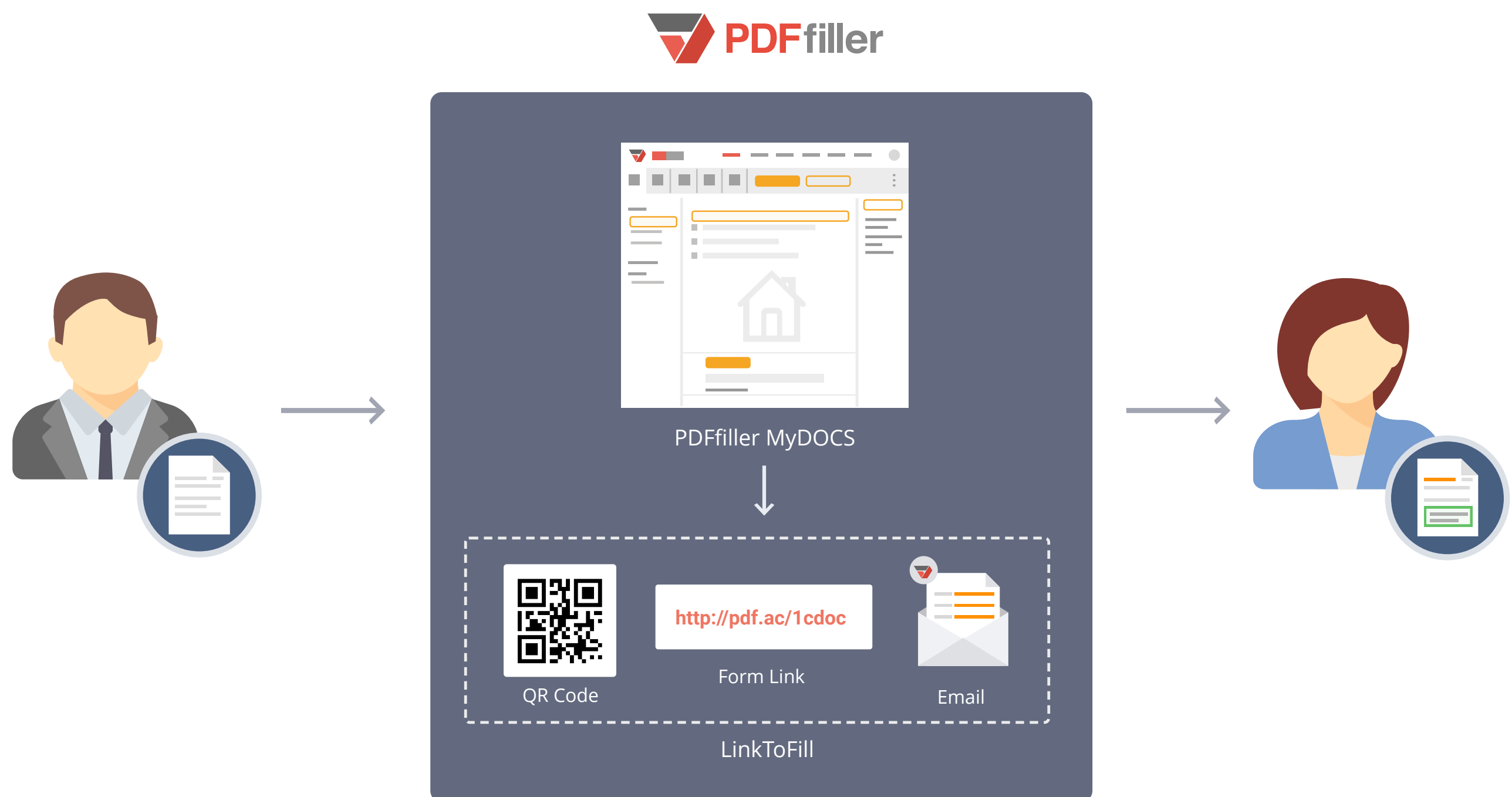
# The Solution

PDFfiller makes it easy to collate, complete, distribute, and return forms.  With its intuitive user interface, PDFfiller makes document management simple.

Now, instead of completing forms by hand or using a complex, clumsy digital solution, Boguslav, HSI Trust, and clients can complete forms digitally; creating a faster, more legible and organized workflow.

"Mostly what we're doing is setting it up here, in-house, and then either emailing to the client, or else we're just using it ourselves," said Boguslav. "In some cases, we're emailing it to the client, and then we have a copy, they have a copy, and we can walk [them through] the form – it's a lot simpler. And sometimes we'll have them fill in parts of it; sometimes we'll just take the information

over the phone and fill it in. Occasionally, they'll email us other documents," which can then be consolidated with other digital forms to create a comprehensive folder of client information. "So either for us internally, or in some cases, with clients, being able to email and let them fill in [forms] – it makes life a lot simpler."
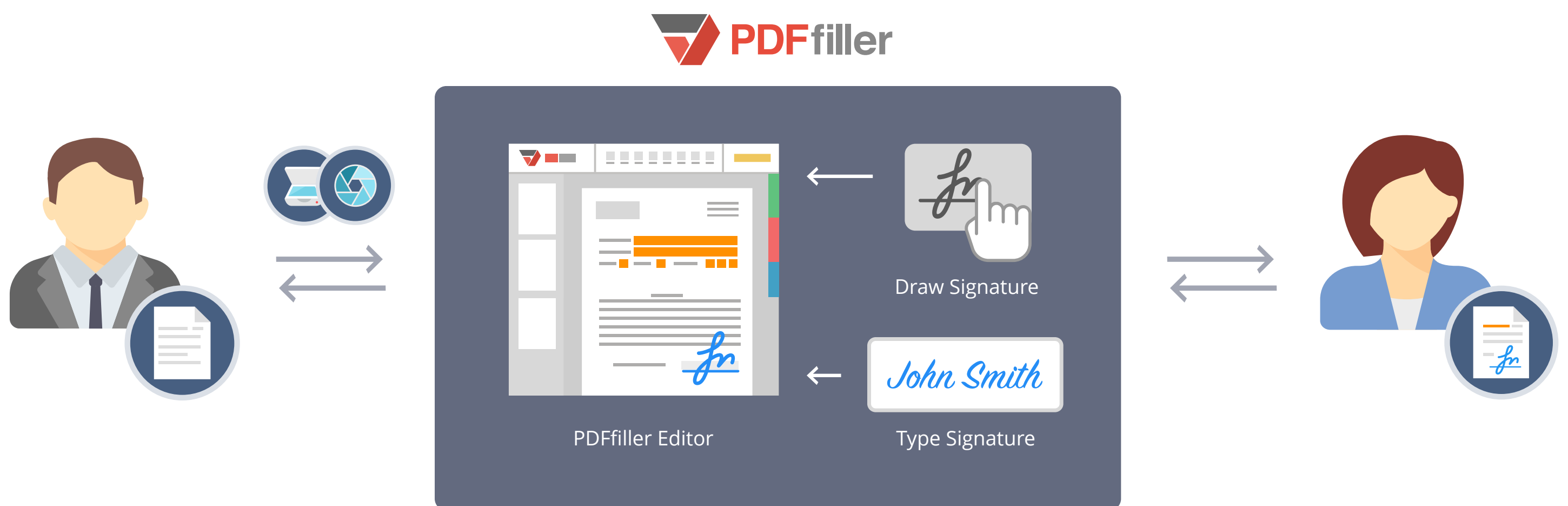


*PDFfiller also features advanced tools like LinkToFill, which allows users to send a digital form to recipients for completion, and have it returned automatically, in just a click.*

With all the documents distributed and collected by HSI Trust, finding an efficient means of storage was critical.  Going digital means that those thousands of documents can be stored remotely in the cloud or on secure hard drive-based digital storage.  Documents kept on PDFfiller's cloud-based system are always accessible, meaning you can edit, send, and sign from anywhere you have an internet connection.

PDFfiller relies on Amazon's S3 servers and adds two-factor authentication and PIN-protected folders to ensure sensitive documents are always kept secure.

With PDFfiller, "either clients or our staff fill in [forms and] instead of trying to deal with all these different forms in different formats, we're able to put them in one place – [PDFfiller] makes life a lot simpler," said Boguslav.  "This lets us put a package together.

Moreover, when dealing with financial forms, being able to add signatures is crucial. PDFfiller allows users to add a signature by drawing on their touch-sensitive device, scanning it in, or simply holding a copy up to their computer's camera. Once saved in PDFfiller's system, a digital signature is available to use on any of your digital documents in just a click – "[adding digital signatures] is coming in handy," said Boguslav. And with PDFfiller's advanced SendToSign feature, you can send digital documents to clients or colleagues for signature and have them returned automatically.



More advanced features available through PDFfiller's intuitive online graphical interface include the ability to highlight important information, redact sensitive text, add sticky notes to direct clients' attention to specific issues, and even API connectivity, which allows users to post documents directly to their website and have them completed by others without ever leaving the page.

This combination of powerful and easy-to-use features make "[PDFfiller] a nice fit for us," Boguslav said. "[PDFfiller is] faster and more focused – Acrobat and the features there are overkill for us. So to spend money on that, even for their online version, when we're using a small portion of it [doesn't make sense]; we just need something that meets our needs, that's not overkill. And [PDFfiller] does it.

# Conclusion

PDFfiller is faster than analog and digital counterparts and features everything you need at hand and nothing you don't.  It is an always-on digital document solution available anywhere, any time, and on any internet-connected device.

PDFfiller's comprehensive digital solution is so fast, efficient and easy to use, that Boguslav has recommended it to many of his clients – "We've got professionals, we've got dentists, some lawyers, we've got folks that have small businesses [as clients and] we've recommended it to them."

PDFfiller "works much better" than paper-based documents or competing digital services said Boguslav.  With so many forms, "it is much easier for us to use [PDFfiller].

Not only is PDFfiller an ideal solution for in-house work, but so too does it serve customers and clients.  "[Clients] are happy, they're very happy. [PDFfiller] makes life easier for them: it makes it easier for us," Boguslav said.

**Without PDFfiller**

**With PDFfiller**