

# Reduce Paper and Enhance Efficiency

In today's world of high-volume trading, Institutional Client Relationship Profile Manager (RPM), available on NetX360<sup>®</sup>, can help reduce certain physically mailed client communications, including statements, welcome letters and change of account information letters.

Consider everything this could mean—less paper, increased operational efficiency and more time to focus on growth efforts.

Using a parent/institutional client profile, you can link a primary relationship and all of its associated Cash on Delivery (COD) accounts. This helps you eliminate sending the same communications to all of the client's individual accounts and ongoing manual updates to existing and new accounts.

## **Institutional Client RPM includes a number of benefits:**



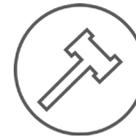
### **PAPER SUPPRESSION**

Manage welcome letters, statements and change of account information letters at the client level instead of the account level when you establish the primary relationship and link associated accounts.



### **CLIENT-LEVEL REPORTING**

Use Report Builder, eSearch and Settlement Status for comprehensive reports and a view of a primary account and all linked accounts.



### **REGULATORY COMPLIANCE**

Automatically create an accounts Acting in Concert (AIC) group for potential large option positions reporting to the Options Clearing Corp (OCC), FINRA rule change (SRFINA-2014-051).

**Get personalized enrollment support from our dedicated team. Call 1-888-367-2563, option 2, then select option 2 again. Contact your Relationship Manager or Account Manager to learn more.**

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[pershing.com](https://www.pershing.com)

One Pershing Plaza, Jersey City, NJ 07399

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