

Digital Workflow & Forms Solution to Reduce NIGOs

Streamline client and advisor onboarding, keep every document in good order, and give your team the workflow automation they need to work more efficiently every day.

Reduce NIGO Errors

- ✓ Smart forms pre-fill with CRM data
- ✓ Real-time checks catch errors before submission
- ✓ Single data entry automatically updates multiple forms

Integrated Audit Trails

- ✓ Automatic record-keeping for every form
- ✓ Secure document storage aligned with FINRA and SEC requirements
- ✓ Built-in suitability checks and supervision

Smarter Advisor Workflows

- ✓ Centralized digital hub for all paperwork
- ✓ Automated routing and approvals
- ✓ Advisors and staff spend less time fixing mistakes and more time with clients

Flexible & Scalable

- ✓ Supports multi-custodian operations
- ✓ Works for enterprise firms and independent offices
- ✓ Grows with your firm's evolving needs — from onboarding to maintenance



How Navigator Works

Navigator™ streamlines the entire forms process: from collecting accurate client input to verifying data and routing it to the right people for fast approvals and signatures.

1. Smart Form Generation

Pre-filled and personalized — Navigator pulls the right forms for your individual situation, auto-populates information from your CRM, and flags errors and exclusions.

2. Client & Advisor Data Entry

Enter once, reuse everywhere — Validated data automatically updates on every required form, eliminating duplicate entry and manual errors.

3. Automated Routing & Approvals

Always flows to the right people — built-in workflows send forms to the right approvers or signers, with notifications that keep tasks moving.

4. Flexible E-Signature Integration

Sign anywhere, anytime — integrated e-signature tools let clients and advisors complete forms however works best for them quickly.

5. Compliance & Audit Trail

Track every step — every change and signature is logged automatically, so your team has a clear, ready-to-go record for any audit.

6. Always In Good Order

Submit once, done right — smart validation and workflows mean your forms arrive complete, accurate, and in good order nearly every time.

Start a Conversation — Contact Forms Logic
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More Accurate. More Efficient.

Forms Logic's Navigator is your trusted partner for smart onboarding, scalable operations, and error-free paperwork.