

# Tuttle Financial Services, Ltd.™



**Company Overview:** Fee-Based Comprehensive Financial Planning  
- Retirement & Pension Analysis - Investment & Risk Management

**web site:** [www.tuttlefinancialservices.com](http://www.tuttlefinancialservices.com)

**Location:** New York

**Industry:** Financial

**NetDocuments Usage:** Salesforce.com integrated for client-centric document management using NetDocuments workspaces

**Software switched from:** File Directory Structure

## CHALLENGE

- Identify a feature-rich document management to integrate with Salesforce.com and handle a large amount of client documents.
- Meet SEC and NIMRA compliance requirements.
- Need instant access to client files at all times.

## SOLUTION

- The firm ties everything from the Salesforce.com record and has client-related emails and documents directly linked and accessed from the respective client's Salesforce.com account to NetDocuments, anytime, anywhere.
- NetDocuments Workspaces are used for each client to scan, store and access all client related documents which easily number into the hundreds.
- Upon a compliance audit request, the firm is ready and able to present their documents for review.

## RESULTS

- "Salesforce (as CRM) and NetDocuments have become critical to the business--both for service reasons and for the extensive compliance we do as a Registered Investment Advisor (RIA) firm. It dazzles my clients as I simply pull up the docs in front of them."
- "I teach extensively and store hundreds of documents and presentations for these courses on-line with NetDocuments and even use NetBinders for easy access by the several hundred professional students I teach each year."
- "The key driver for selecting NetDocuments was its rich interface and integration with Salesforce.com."
- "We are very much like a law firm because we are paper intensive. Its superb to have NetDocuments help us manage all our docs on behalf of the clients."
- "NetDocuments support people have been terrific."
- "NetDocuments prevents us from having to hire an administrator to handle our documents, saving us somewhere in the range of \$50,000 base plus benefits a year. And instead of sending documents to clients using mail, we just send an email to the client directly from within NetDocuments."