



*Take the Work Out of Paperwork*

## **FREQUENTLY ASKED QUESTIONS**

### **Q: What is Quik!?**

**A:** Quik! is a provider of forms automation and management solutions for companies looking to maximize efficiency and productivity. Its technology is simple and easy to use, reducing the time and hassle of paperwork and empowering users to do their best work. Each form is fillable, interactive, secure and signable, allowing Quik! customers to collectively save thousands of trees per year.

### **Q: Who are Quik!'s customers?**

**A:** Quik! solutions are used by the top financial firms in wealth management and over 100,000 financial professionals in the U.S. 16 of the top 19 independent broker-dealer firms (as reported in *InvestmentNews*) use Quik!.

### **Q: How does Quik! save trees?**

**A:** One tree can create 8,333 pieces of paper. Quik! saves a tree every hour of every day. By using Quik! forms online, customers have helped save more than 36,000 trees since the company began. In addition, Quik! partners with the Arbor Day Foundation to plant 10,000 new trees each year.

### **Q: What is the Quik! API?**

**A:** The Quik! application programming interface (API) is a back-end tool that allows companies to easily implement its forms automation software on their intranet or client-facing website.

### **Q: What is the Quik! App?**

**A:** The Quik! App is a full-scale software-as-a-service (SaaS) for finding and generating forms. It allows clients to use their own data sets to seamlessly automate any form in Quik!'s library.

### **Q: How large is the Quik! forms library?**

**A:** Quik! has an extensive library of more than 34,000 forms. Quik!'s library also includes standard regulatory compliance forms issued by local, state and federal government agencies and entities.



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**Q: How long does it take Quik! to build a new form?**

A: Forms are built within 10 business days or less.

**Q: Do clients have to enter the same information over and over into each field?**

A: No. Quik!'s unparalleled standard definition of over 500,000 unique fields means data is automatically transferred to repeated fields. The Quik! field definition includes common data points like the account owner's first name, last name, date of birth and much more.

**Q: What operating systems and browsers are compatible with Quik! software?**

A: The HTML form generated by Quik! software runs on all current and up-to-date HTML-5 browsers such as Chrome, Firefox, Internet Explorer and Safari. The forms are backwards compatible to HTML-4 browsers, including Internet Explorer version 8.0, making it possible to fill out any form on Windows, iOS, Android, Linux and any operating system with a modern browser.

**Q: What online security measures and systems does Quik! have for its products?**

A: All services are exposed via 256-bit SSL (TLS 1.2+). Everything is controlled through several firewall layers, strict access by control, and 24/7 monitoring.

**Q: How does Quik! verify the security of its customers' data?**

A: Quik! does not host or store any of its customers' client data. The company adheres strictly to the terms of its privacy policy (<https://quikforms.com/PrivacyPolicy.aspx>) and to the terms of its confidentiality agreements.

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