

Surface in Finance

Distinguish your financial service business with Surface.

To deepen customer loyalty and stay competitive, financial professionals need data and business intelligence to serve their customers in a timely and personal way. Surface is a lightweight, versatile device that helps facilitate productive face-to-face conversations to address customer needs and cement new relationships.

Branch Transformation

Fading are the days when an unidentifiable bank customer would walk into a retail bank and be directed to a teller line. Today, a universal teller armed with a Surface device can greet a customer when they walk in the door, pull up their account history, and immediately engage in a more meaningful, customized interaction.

Enlightened Advising

Investment clients want the assurance that their money is being expertly managed and their financial goals are being met. Using Surface, investment advisors are equipped with a compact, mobile device with powerful processing capabilities.



Open multiple apps side-by-side to provide a complete view of each customer



Convert easily from tablet to laptop with optional Type Cover and built-in Kickstand



Windows 8 provides enterprise-grade security and manageability



Collect signatures directly on screen with Surface devices



Power and performance combined with longer battery life



Connect to peripherals and add storage easily with USB and microSD™ ports



Surface Pro 3 runs Windows 8.1 Pro and Office plus your LOB apps



Built-in security features including BitLocker, TPM, Windows Defender, and Secure Boot

Streamlined Insurance Sales

Selling insurance is a competitive, demanding, on-the-go job. Surface allows sales professionals to prepare and run interactive presentations that combine video, PowerPoint, and personalized content using the same tools they would at a desk.



Surface devices are lightweight with long battery life for ultimate mobility



Pull up data instantly and effortlessly with Instant-on functionality



Devices can be managed easily including remote clean wipe to ensure data isn't lost when employees leave



The touchscreen and pen capture customer signatures

"The path for the apprentices, that they are trained on the proper applications for the future, is really very important and that is the reason we decided to use Surface tablets."

- Marcus Wiche, Head of IT
Volksbank Mittelhessen



"Now that a bank employee can harness all account data in their hands, the level of customized service they can bring to each customer is exponentially better with Surface Pro."

- Jim Ellaboudy, SVP of
Technology, City National Bank

Accessories



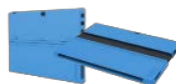
Point of Sale Readers

Anywhere Commerce and Magtek magstripes, chip & pin, card and EMV readers for insurance sales



Customer Kiosks

Showcase & secure Surface as a fully encased or freestanding kiosk with ArmorActive.



Device Cases

Incipio rigid hard shells for ultra thin and lightweight protection and enhanced grip.

Financial Services Apps

Insurance

OnBase insurance Field Adjustor
Sage Customer Manager

Advisory Services

NASDAQ Director's Desk
Sungard Concierge
Popmoney