



Vidyo®

# Vidyo Enabled Financial Services



## Benefits

- The power to include subject matter experts and resources at any point during a video consultation.
- The ability to connect with an investment advisor for scheduled meetings simply by clicking on a link in their Outlook or Google calendars.
- A convenient way to see and review portfolio account summaries and reports while meeting together online.
- Speedier transactions using electronic document signing software.
- Video communication from any web browser using any mobile or desktop device and a simple internet connection.



“Customers want to be able to access your products when they want, where they want and how they want. And I think customer experiences are going to change even further because of technology...”

-Bob DiMuccio, Chairman & CEO, Amica Mutual Insurance Company

## Business Challenge

The world of finance lives and breathes online. Every day, more transactions happen online; clients today are simply too busy to visit their financial institution to conduct business. Your high net-worth clients are plugged in and on the go, and they won't settle for anything less than impeccable service, whenever and wherever they need it. In order to invest, borrow and manage their portfolios with confidence they expect a financial services firm to be accessible, providing immediate expert consultations and a seamless way to make decisions and manage wealth.

The financial industry is turning to Vidyo to meet these challenges, and adopting the VidyoWorks™ platform to deliver video-enabled financial services that cultivate stronger, more lasting relationships with clients.

## Vidyo Solution

The VidyoWorks™ software platform video-enables your high-value client services and is easily integrated with your financial services infrastructure, applications and workflows. Natural, interactive HD video meetings can be conducted securely over the Internet and 3G/4G/LTE mobile networks. Subtle facial expressions and gestures that enhance understanding are part of the interaction, not lost in transmission.

On-board video conferencing in just days or weeks, without the need for special-purpose hardware or IT expertise. Ease of use and convenience flatten the adoption curve. Employees are quickly proficient and there's no intimidation factor for invited guests to join and collaborate in your video conferences.

Business value grows as you extend video conferencing across your organization, whether you deploy on-premises, in the cloud, or in a hybrid environment.

With VidyoWorks, you can have secure face-to-face interactions with your high-value clients when their busy schedules and conflicting priorities make travel impossible. Discussing investment goals and portfolio performance involve sensitive issues and millions of dollars may be at stake. Video communication offers immediacy and clarity, and with that a level of trust that nothing else can match when in-person meetings are not an option.



Vidyo, Inc. (Corporate Headquarters)  
433 Hackensack Ave., Hackensack, NJ 07601, USA  
Tel: 201.289.8597 Toll-free: 866.998.4396  
Email: vidyoinfo@vidyo.com

EMEA  
emea@vidyo.com  
+33 (0) 488 718 823

APAC  
apac@vidyo.com  
+852 3478 3870

INDIA  
india@vidyo.com  
+91 124 4111671

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