

Go paper free with InterFAX for financial firms.

Successful financial firms rely on secure communication tools to keep business running smoothly. The right tools can streamline a firm's processes, while the wrong ones can break down systems and create barriers.



In 2019, 85% of survey respondents said they would consider the methods a financial advisor uses to communicate when deciding whether or not to retain their services.



It doesn't matter if you're an independent financial advisor, CPA, large banking chain, cash handling escort, Insurance salesperson, estate attorney, or a broker on Wall Street; your priority is always safeguarding sensitive material, such as:

- User account details
- Private client information
- Loan documents
- Estate management
- Federal Reserve transfers
- Cash exchanges
- New registrations
- Personal-identifying data
- HIPAA-protected information
- Estate and legacy planning
- Charitable donations
- Trade data
- Rate change notices
- Wire transfer directives

The financial services industry is over 300 times more likely to be targeted by hackers than other sectors.

Online cloud fax offers a solution to protect financial organizations against vulnerabilities and potential security breaches caused by cyberattacks. InterFAX is a safe online cloud fax service—the most trusted means of communicating confidential information within the [financial industry](#).

Between 2018 and 2022, over 950 financial data breaches resulting in over 150 million leaked records.

There are countless ways that excessive paperwork and unsecure communication methods can lead to disastrous data breaches. Even with a cover sheet, traditional fax has significant safety concerns, service bottlenecks, delayed delivery, and inefficient data management.

As soon as you send an on-premise fax, it's out of your control. The receiving machine will spit out confidential information that may or may not be picked up by the correct person in a timely manner.

Transitioning from on-site fax machines to web-based is better for your team, your clients, and the environment.

Your clients expect fast service and the peace of mind that their PII is secure regardless of whether you're a large bank or a local firm. InterFAX meets the world's most rigorous safety standards while minimizing your firm's excess waste and unnecessary upkeep.

Various communications tools are essential to the financial sector, including:

- Secure faxing capabilities
- Messaging apps
- Softphones
- Document storage solutions
- Calendar schedulers
- Social media
- CRMs

InterFAX helps financial services professionals of all shapes and sizes maintain confidential communications.

InterFAX is used by banks, trading houses, wealth managers, insurance companies, and more to process credit applications, trade confirmations, claim forms, and collection notices. Looking for reliable cloud fax to securely streamline everything from account information to loan applications, wire transfers, and more? InterFAX is your trusted turnkey solution.

InterFAX Eliminates:

- Hardware installation
- Software licensing
- Machine maintenance
- Additional phone lines
- Excessive paper waste
- Unsecure communication

Ready to see InterFAX in action?

Contact us to see how we can transform your firm.

[Request a Demo](#)

Upland InterFAX empowers users to cost-effectively fax at volume to anywhere in the world quickly, reliably, and securely from a web interface with no installations needed. With InterFAX, users can choose their pricing package and customize services to their needs using an integrated faxing developer API.