

A photograph of four business professionals (two men and two women) in an office setting, all smiling and raising their arms in celebration. They are holding up papers and documents. The background shows office windows and a desk with a computer monitor.

Know Who's Doing What, When....
....and How.

Accountability at its Finest.

jCore Workflow

jCore's Workflow component automates the communication that's critical between home office departments and advisors. Real time record retention will not only mitigate transactional issues, but manages accountability between people.

Processes are orchestrated through our process wizard. This simply provides a mechanism for task assignment with accurate, on-time completion.

More efficient forms processing.

Internal and external collaboration.

Automatic record retention and compliance with regulations and policies.

Validates client and account data.

Documents are stored and easily accessed with a SEC approved plug-in.

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