

## M&I Financial Advisors Capitalizes on Document Conversion Outsourcing

### Business Challenge

For a successful company like M&I Financial Advisors, Inc., a subsidiary of Marshall & Ilsley Corporation, habits die hard. Regardless, just 3 years ago, it came to the attention of management that their filing system needed a complete re-do. Business was good and along with that success came an abundance of client records. Some 1.5+ million confidential pages of documents, culminated over a 30 year span, were being stored in roughly 100 filing cabinets occupying valuable space. A recent move to a new location required, at a minimum - a walk to another building, followed by a manual search, accompanied by copying/faxing for distribution, and then returning those documents to their appropriate building, room, cabinet, drawer, file... Obviously, all this took time and in the world of investing, time is money.

### Solution

M&I Financial Advisors hired Security Microlmaging to convert their paper records to a digital format, where records could be managed and accessed by 120 financial advisors and their 75 assistants, regardless of their location. Not only does this system allow instant access, but it also provides streamlined search options for various data including client name, social security number, tax id - to name a few. In addition, employees can view documents from their line-of-business application. This enables them to transfer important data from one application to another seamlessly and with a high degree of security which is extremely important in financial services.

### Products & Technologies

Kofax Capture Software  
Hyland OnBase ECM Platform, with Workflow  
EMC Centera Storage  
Fujitsu and Bowe Bell+Howell Scanners

### Benefits

"We definitely saved costs," states Wayne Kenning, VP of Operations. Obviously, having instant access to data compared to all the time it previously took for employees to retrieve, distribute, and return documents is significant. Customer service has also improved since questions can be answered on the spot. Audits of our operation are much more efficient. Auditors are temporarily given access to the system and employees can continue their daily responsibilities. Kenning adds, "Overall, the talents of our employees are better utilized and we are positioned to leverage the technology while expanding our business."

Security Microlmaging

Wisconsin 414.271.3074 | Illinois 847.816.6172 | Missouri 636.669.0855 | Ohio 216.575.0100  
info@securitymicro.com [www.securitymicro.com](http://www.securitymicro.com)

## M&I Financial Advisors Case Study

*"The talents of our employees are better utilized now."*

Wayne Kenning  
Vice President Operations  
M&I Wealth Management

### Company

M&I Financial Advisors, Inc.  
Milwaukee, WI  
[www.mibank.com](http://www.mibank.com)

### Industry

Financial



### Company Profile

For 160+ years, M&I's comprehensive approach to helping clients grow, manage, and preserve wealth has earned them the trust and respect of corporations, nonprofit organizations, individuals and families. Their 1,400+ professionals are backed by the resources of a nationally recognized trust company and one of the Midwest's largest banks, offering a broad array of products and services to meet their clients' needs now and in the future.