

Intelligent Fax Built for Financial Services

**Cloud-Delivered, AI-Powered,
Zero Infrastructure Required.**

When advisor productivity is measured by investment strategy rather than document handling, wealth management workflows scale automatically and advisors stay focused on what matters most: client relationships. InterFAX makes it happen.



**Client documents arrive classified, extracted, and routed,
transforming paperwork into seamless workflows.**

AI-Driven Client Document Intake

InterFAX+AI instantly auto-classifies account applications, beneficiary forms, trade confirmations, compliance filings, etc.

Extracts data such as client names, account numbers, investment amounts, and signatures to auto-populate your systems

Routes new accounts, beneficiary changes, and client correspondences to the correct advisors

Reads handwritten forms, account applications and signed beneficiary designations to speed up processing

Compliance You Can Demonstrate

Complete audit trails with immutable timestamps demonstrate controls during FINRA and SEC examinations

SOC 2 Type II, ISO 27001 security standards plus regulatory compliance across every client transmission

Social security numbers, account details, and investment amounts get flagged and protected

TLS protection with data residency options that satisfy regulatory requirements

Client investment data and personal information never train AI models

Wealth management professionals create workflows directly—no coding, no IT dependency



See What Changes When Client Documents Work for You

With InterFAX+AI, financial advisors can work remotely, focusing on portfolio performance, investment strategy, and client relationships. Operations teams handle strategic initiatives instead of manual data entry, and compliance officers demonstrate controls with evidence, not explanations. When AI handles the paperwork, client onboarding accelerates because internal friction disappears.

Growth Without Growing Pains

Onboard 10 accounts or 1,000!
InterFAX+AI scales instantly while your operations headcount stays flat

Tax season document surges and quarterly statement requests process without overtime or bottlenecks

Proprietary portfolio systems and niche wealth management tools connect through flexible APIs

Pre-built workflows for account opening, beneficiary changes, and client correspondence eliminate months of customization updates

Systems that Work Together

Portfolio management, document repositories, and integrations get advisors productive in weeks

Client information extracted from applications populates account opening, compliance systems, and advisor CRM automatically

When account opening processes change, your team adjusts routing rules immediately so there's no developer backlog

Mixed submissions separate automatically, including new account forms, onboarding, beneficiary updates, compliance, or investment questions to the advisor



Ready to get things done?

Let us show you what Upland InterFAX can do.

[Request a Demo](#)

Upland InterFAX is an enterprise-class cloud fax solution that enables global organizations to send and receive documents and streamline digital workflows with optional AI-data management features. Easily integrate with systems you use daily and utilize our scalable, versatile Developer API for endless customization.

