

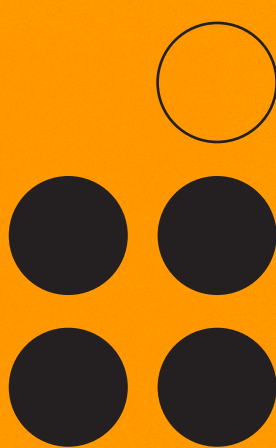
# Financial Services Firms Trust Upland Qvidian

With Qvidian, you can secure and centralize RFP and proposal content, always be audit-ready, and create sales documents that win more deals.

## Financial Services Expertise

Leading global customers

**4 of the 5**  
world's largest asset  
management firms



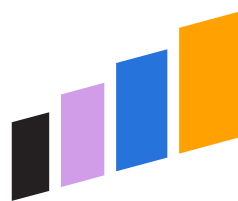
**4 of the 5**  
largest European Banks



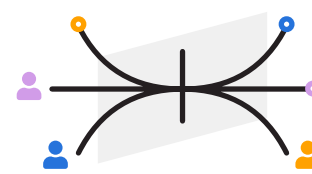
**8 of the 10**  
largest U.S. Banks



**25+**  
years' experience



**200,000+**  
users



**1,000+**  
customers

## Commitment to Security

### Critical certifications and standards



GDPR

**ISO  
27001**

**SSAE 16  
TYPE II**

### Security-centric design

- Customizable user access and permissions
- Multi-step review and approval workflows
- Change tracking, version control, and event auditing

## Proven Results

Qvidian customers reported

**40%**

Quicker content creation on average

**30%**

Faster response times on average

**28%**

Increase in win rates on average



*Proposals that used to take our bankers hours to complete now sometimes take just a few minutes using Qvidian.*

**Tony Brunty**  
Huntington National Bank



*It was Qvidian going above and beyond, taking our issues seriously and treating us as we would treat our own clients that really made the difference.*

**Heidi Helwagen**  
Brown Brothers Harriman



**Ready to work with an expert in the financial services industry?**

**Contact us today**

upland  
**Qvidian**

**Upland Software** (Nasdaq: UPLD) is a leader in cloud-based tools for digital transformation. The Upland Cloud enables thousands of organizations to engage with customers on key digital channels, optimize sales team performance, manage project and IT costs, and automate critical document workflows.

Top financial services lists compared to Qvidian customers 2/21. Qvidian results sourced via client survey; available on request.