

## Arca Financial at a Glance

- Financial planning firm
- Based in Waterloo, ON
- No. of employees: 23
- TitanFile client since: 2020
- [www.arcafinancial.com](http://www.arcafinancial.com)

**“ Once we discovered TitanFile, it was a “no brainer” to implement for our clients at Arca Financial Group. TitanFile is easy to use, simple to implement, and our clients appreciate that we have a secure platform to keep their information secure at all times.”**



**John Lunz**

Senior Financial Advisor &  
Associate Portfolio Manager

## How Arca Financial Implemented a Secure Client Portal and Improved Its Delivery of Client Services



### Arca Financial Group

Founded in 1999, Arca Financial Group is one of Canada's pre-eminent financial planning and wealth management firms with currently over \$600 million in client assets under management. The firm is committed to providing its clients with a world-class experience in the management of their financial plan; a plan that allows them to create personal wealth, protect that wealth, and distribute it according to their wishes.

Arca Financial Group continuously invests in the best-in-class technology to provide the highest level of security and most efficient client services.

### The Challenge

As a financial planning and wealth management firm, Arca Financial Group has access to a lot of confidential client information. To share this information, staff and clients previously used a combination of courier, in-person drop off, and secure email, each of which posed several challenges:

- Courier required a lot of preparation. Documents needed to be printed, packaged, and mailed. Delivery times also resulted in delays.
- Packages dropped off in person were inconvenient for clients as it required dedicated trips to the office.
- Secure emails were complicated, required too many steps, and caused too much friction for clients which often resulted tech support calls.

The leadership team saw an opportunity to standardize on a single solution to provide staff and clients with a more secure and efficient way to share confidential information. The goal was to deliver a better experience for clients through a secure client portal.



**“ I have had a number of clients that have commented how simple it was to access their files and they like the fact that they are secured. This program is exceptionally easy to use, even for people that are not familiar with computers. ”**

**Barbara Hunt**  
Executive Assistant

**Interested in learning more about TitanFile?**

**Book a demo at:**  
[\*\*titanfile.com/book-a-demo\*\*](https://titanfile.com/book-a-demo)

## **The Solution**

Arca Financial Group chose TitanFile as the winning solution because it was exactly what the firm was looking for, a secure client portal that enabled two-way file sharing and the ability for staff to manage all client information in one secure location.

TitanFile is very intuitive. Clients love how easy it is to send and receive information through TitanFile even if they have never used it before in the past. As a web-based application, staff and clients can easily log into TitanFile from anywhere and at any time to retrieve or upload new information.

In addition, TitanFile is built with state-of-the-art security features that ensures that client information is protected at all times. This gives staff and clients peace of mind.

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## **The Result**

Since deploying TitanFile, Arca Financial Group has seen a significant improvement in turnaround time for documents being shared to and from the firm. Clients no longer have to send information through unsecured emails or hand-deliver them to the firm.

The success of the TitanFile deployment was indicated by three factors:

### **1) Easy access to a secure client portal, anywhere, anytime**

TitanFile became the one-stop-shop for all of the firm's file sharing needs. Both staff and clients can easily share information and keep the information organized in a single location.

### **2) Improved security**

TitanFile automatically encrypts information while it is in transit and at rest, ensuring that all confidential financial information is protected at all times.

### **3) Improved client experience**

Arca Financial's clients are happy to be working with a firm that prioritizes the customer experience and their privacy.

#### **About TitanFile**

TitanFile is an award-winning secure messaging and file sharing platform for external correspondence among professionals, their support staff and clients. TitanFile is as easy to use as email, resulting in increased efficiency, cost savings and higher customer satisfaction while improving security and compliance.