

A high-return investment for financial advisors

Productivity, professionalism, and higher ROI with one device

Thin, light, and powerful, Surface reduces your need for multiple devices. It's a desktop to crunch financial numbers, a tablet when sitting side-by-side with a client, and a laptop when you're away from your office. Whatever the day demands, you stay nimble and productive everywhere you go.



🕒 8:00 A.M.

One device that moves with you throughout the day

Catch the global market updates, then connect to the company network, check your schedule, and start your day feeling prepared.

*A powerful desktop
at my fingertips*



🕒 10:00 A.M.

Surface adapts to you, not the other way around

Dock Surface and connect to multiple monitors. Surface easily runs all the programs you need—from PowerPoint to Excel spreadsheets—simultaneously.

Lots of ports to connect
monitors, speakers,
a full-size keyboard, and more



🕒 2:00 P.M.

Look more professional

Use Surface in tablet mode to conduct a portfolio review with a client in brilliant HD. Meanwhile, Surface Pen helps you quickly capture an idea, or a client signature.

I'm updating client portfolios with touch, Pen, or mouse on the spot



① 6:00 P.M.

Work from anywhere

Your client meeting was a success. And since you've made effective use of your downtime throughout the day, your follow-ups are already done. No need to head back to the office.

*Day's done, going home,
and my work-life balance
is trending upward*



See how your colleagues save time using Surface



Surface is the most important tool that we've brought into the firm in recent history that is helping drive performance."

Christian Wallace
Research analyst
Emancipation Capital



People are changing the way they're banking. Surface allows us to empower our mobile colleagues while providing the type of extraordinary service our clients expect."

Jim Ellaboudy
Senior Vice President, Business & Technology
Services
City National Bank



With the Surface Pro 3, I can react in real time, which helps us win business and ultimately increase revenues. I'm easily saving two to three hours a week by eliminating prep and follow-up work."

Ryan Parry
Senior Territory Manager
Safeco, a division of Liberty Mutual

Proven results

15%

Improvement in close rate and 20% improvement in deal size leveraging Surface Pro devices to deliver mobile presentations and information from LOB systems.

Surface Pro users reported a 10% improvement in productivity by avoiding repetitive tasks and taking advantage of “in between” times.



>90% Agree or strongly agree they get more done away from their desk

>60% Agree or strongly agree they are more satisfied with their ability to get things done

\$615

Saved in device purchase costs as employees can be provisioned with a single Surface Pro.



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