

Customer story • Carte Financial Group

# Zero developers. Unlimited journeys.

From manual work and static forms to smart, guided workflows that capture the right information the first time.



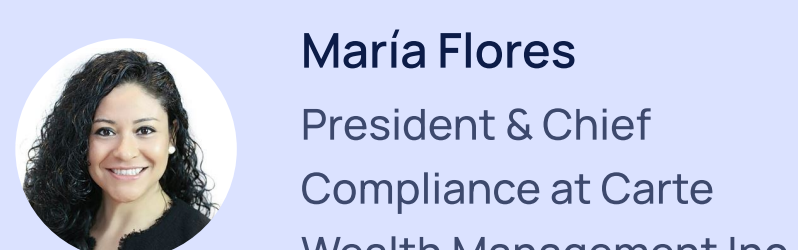
Carte Financial Group replaced paperwork and static Google Forms with smart digital workflows, enabling a lean team to quickly build and launch compliant processes with EasySend's AI PDF Converter, including advisor onboarding, compliance, billing, and internal operations.

3-4 days to build a journey

50% faster build time with AI PDF Converter

100% audit & compliance ready

1 builder, no devs



**Maria Flores**  
President & Chief Compliance at Carte Wealth Management Inc.

“The best part is cost saving and time. And time is something you cannot get back. It's also about increasing client satisfaction rates.”

## About Carte Financial Group

Founded in 2007 by Kirk Purai, Owner and CEO of Carte Financial Group is an award-winning Canadian financial services company built by advisors, for advisors. Carte operates two subsidiaries – Carte Risk Management (National MGA) and Carte Wealth Management (a mutual fund and exempt market dealer). The company provides best-in-class tools, technology, marketing, and compliance to a growing network of 1000+ independent financial advisors, empowering them to reduce their administrative workload and scale their business.

### Founded by



**Kirk Purai**, Owner & CEO

### Founded in

2007

### Employing

20+

### Digital journeys

- Billing
- Onboarding
- Compliance

## Mission

### Replace manual work with smart, compliant workflows

Carte sought a way to replace manual work with seamless, compliant digital workflows that reduce administrative burden, improve accuracy, and support growth—without dev reliance. At the same time, growing regulatory requirements, including becoming an investment dealer, demanded audit-ready processes. The company needed a platform that a lean team could own end-to-end, while remaining compliant.

### Core desires

- Do more with less
- Reduce admin burden
- Maintain regulatory compliance
- Save time across processes
- Support growth without adding headcount
- Deliver seamless, efficient experiences

## Solution

### Empower a lean team to build & manage processes digitally

#### Faster launch with AI PDF Converter

Because EasySend is an AI-powered, no-code platform, Carte designs and deploys digital workflows without long dev cycles or heavy IT resources. As a result, they digitize processes quickly, see results sooner, and maintain the flexibility to adjust journeys as needed.

#### Full visibility and control

Carte gains real-time insight into every step of the customer process. Instead of guessing, teams can instantly see progress, identify bottlenecks, and intervene when needed. This transparency improves internal coordination and enables more proactive customer service.

#### More efficient operations

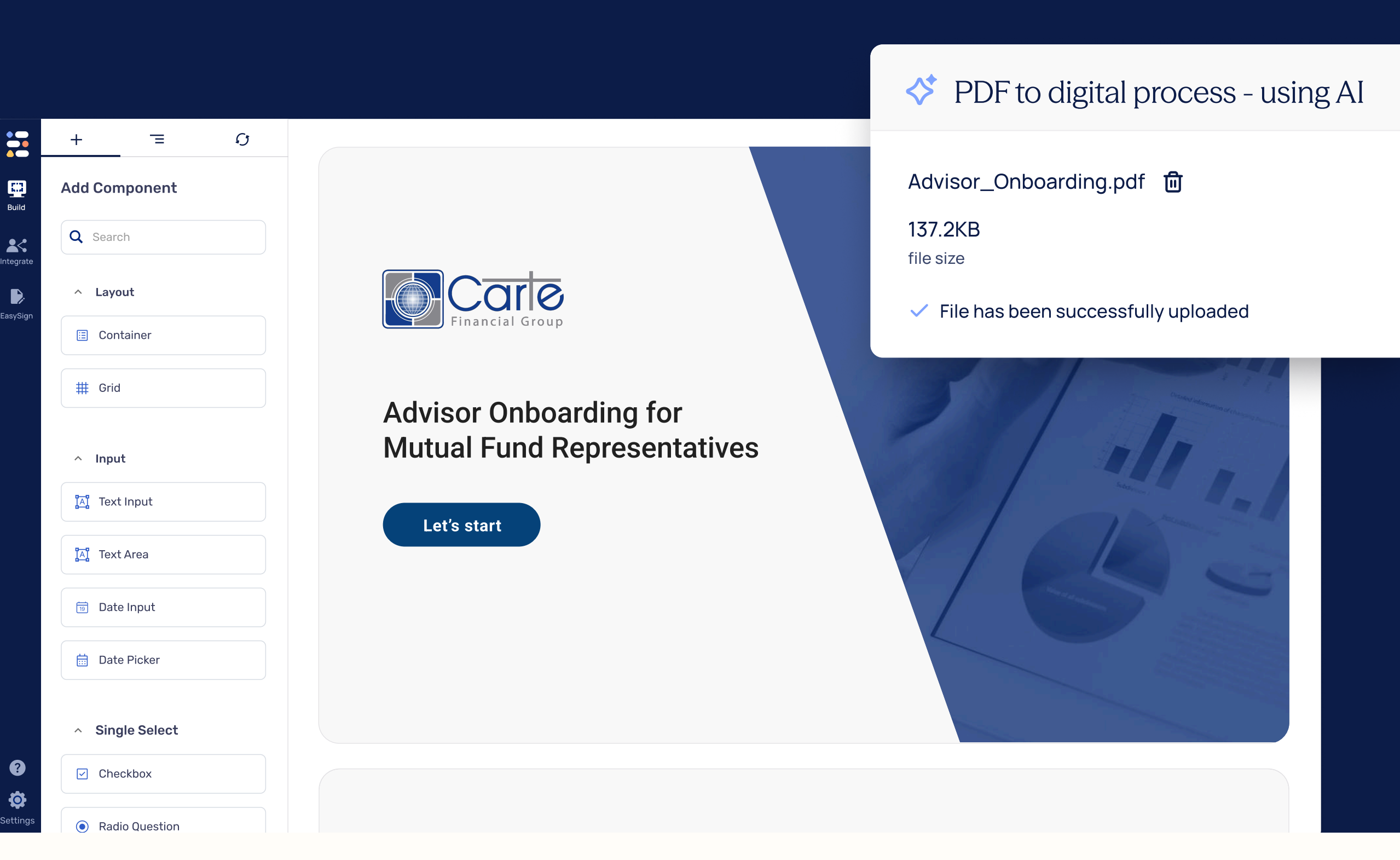
EasySend helps eliminate time-consuming paperwork and static Google Forms by automating steps within a single AI-assisted digital journey, freeing up staff to focus on client relationships and revenue-generating activities.

#### Scalability for growth

Carte can handle higher customer volume without increasing staff or operational complexity. Automating workflows and standardizing data capture make it easier to scale while maintaining consistency, speed, and service quality.

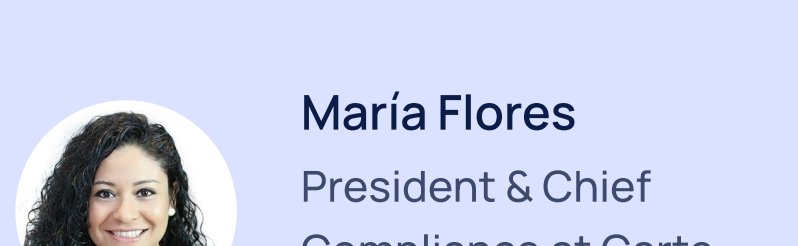
#### Fewer errors and greater accuracy

EasySend ensures that all required information is captured the first time. Built-in validations prevent incomplete or incorrect submissions, leading to cleaner data, fewer delays, and less back-and-forth.



## The power of EasySend at Carte Financial Group

<p><b>AI PDF converter</b> Carte turns static PDFs into fully digital, interactive journeys in minutes with AI.</p>	<p><b>No-code builder</b> Carte builds, customizes, and launches digital customer journeys without relying on dev teams.</p>	<p><b>Smart forms</b> By replacing static forms with dynamic forms, Carte guides customers at every step.</p>
<p><b>CRM integration</b> Syncing customer data with Carte's CRM eliminates manual entry and reduces costly mistakes.</p>	<p><b>Workflow Manager</b> Carte maps, manages, and automates every customer journey, reducing manual work.</p>	<p><b>Customer links</b> Carte agents share secure, personalized links with their customers and advisors.</p>
<p><b>Formula Editor</b> Carte added calculations and logic within journeys to ensure accuracy and compliance.</p>	<p><b>Training and support</b> By partnering with EasySend, Carte gains expert onboarding, responsive support, and video training.</p>	<p><b>Compliance workflows</b> Carte is audit-ready with digital processes that reduce risk and maintain compliance.</p>



**Maria Flores**  
President & Chief Compliance at Carte Wealth Management Inc.

“We used to use manual forms or Google Forms, but they don't have the dynamic capabilities of EasySend. With smart forms, the questions adapt based on responses, and that's exactly what we needed.”

## Partners since 2022

EasySend and Carte Financial Group work closely to modernize Carte's complex, compliance-driven operations. By replacing manual work and static Google Forms with smart AI digital workflows, EasySend enables Carte's lean team to design, deploy, and manage processes independently while maintaining regulatory rigor.



## Security you can trust

We're dedicated to keeping your data secure with enterprise-grade security standards. Our platform and electronic signature tool comply with the highest international standards, including GDPR, SOC 2, ISO 27001, PCI DSS, and HIPAA compliance.



## About EasySend

### EasySend is the missing layer to limitless self-service.

Our AI-powered digital platform makes it easy to plan, create, and manage personalized customer interactions across every channel, seamlessly connected to your business software. With our low-code suite of products —Journeys, DynamicDoc, EasySign, and Workflow Manager— you go beyond traditional forms to deliver thoughtful, dynamic, and efficient experiences that go far beyond traditional forms.

[Learn more](#)