Scribe PDF

FOR FINANCIAL ADVISORS

32 TOOLS · STATEMENTS, REVIEWS & DISCLOSURES

The account statement, the client review, *the disclosure deadline.*

Account statements, investment policy statements, client onboarding forms, compliance disclosures: every PDF that moves through an advisory practice, handled on-device in one app, without emailing files between six different tools.

32
TOOLS IN ONE APP

0
FILES LEAVE YOUR DEVICE

1
APP, ONBOARDING TO REVIEW

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Built for the paperwork behind the portfolio.

An advisory practice runs on PDFs: account statements sent quarterly, investment policy statements drafted at onboarding, compliance disclosures filed on schedule, client reviews prepared for every meeting. Scribe PDF covers what happens to every one of those documents from onboarding to review.

> **Why on-device matters here:** account numbers and portfolio details are exactly the files that shouldn't round-trip through someone else's server. Every tool below runs locally, inside Apple's app sandbox. Nothing is uploaded to process a PDF.

Create & Organize	8 tools
Read & Extract	7 tools
Protect & Secure	6 tools
Sign & Mark Up	5 tools
Present & Listen	4 tools
Optimize	2 tools

32
tools, organized into six clear workflows

2
platforms: iPhone, iPad, and Mac

0
servers your client data touches

1
app, from onboarding to review

Create & Organize

Assemble the client file from whatever the custodian, the CRM, or the scanner actually produced.

Merge PDFs

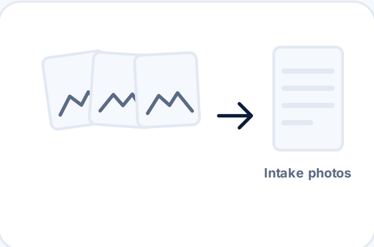
Create & Organize

The client review packet needs one file, not six exports. Merge the account statement, the performance summary, and the disclosure into a single PDF for the meeting.

Split PDF

Create & Organize

A 40-page portfolio review needs the equity section pulled out for one client and the fixed-income section pulled out for another, without re-exporting from the reporting software.



Images to PDF

Create & Organize

Fifteen photos of a client's paper statements become one clean PDF for the onboarding file, with no separate scanner and no re-typing the numbers.

Clipboard to PDF

Create & Organize

Copy a holdings table straight out of the reporting software and paste it into a one-page PDF for the client update, without a screenshot tool in between.

Page Organiser

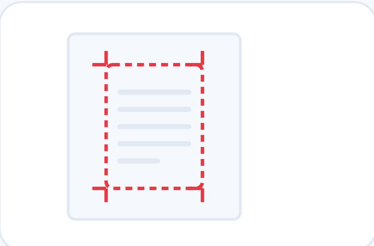
Create & Organize

The client review binder came back from the printer with the fee disclosure ahead of the performance summary; reorder the pages to match the compliance checklist before the meeting.

Rotate Pages

Create & Organize

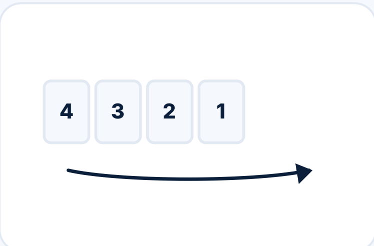
Half of the 35 scanned account statements arrived sideways. Rotate every page back to portrait in one pass before they go into the client file.



Crop Pages

Create & Organize

A scanned custodian statement has a wide margin from the printer; crop it to match the rest of the bound client file.



Reverse Pages

Create & Organize

The scanner fed 25 pages of signed disclosures in reverse order. Flip the page order back to chronological sequence before the compliance review.

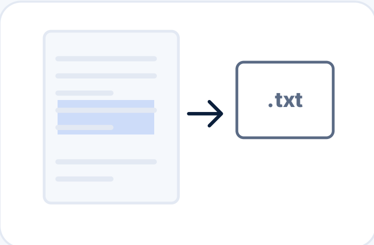
Read & Extract

Get the holdings, the figures, and the fine print out of a PDF and into something usable.

OCR

Read & Extract

A seven-year-old paper statement has to be referenced for a cost basis question, but it's a photocopy. OCR turns it into real, selectable, searchable text before it goes in the client file.



Extract Text

Read & Extract

Pull just the risk tolerance paragraph out of a 20-page investment policy statement into plain text, ready to drop into the review notes without retyping.

Extract Pages

Read & Extract

Export only the allocation chart page from a 30-page quarterly review as a clean PNG for a client email, with no screenshotting and no re-opening the full report.

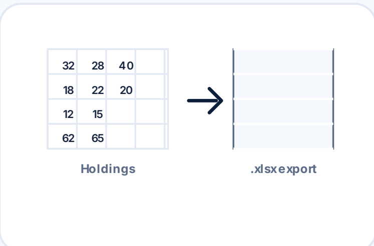


Table Extraction

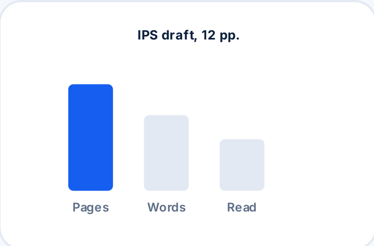
Read & Extract

A holdings table is buried in a PDF export from the custodian. Pull it straight into a real spreadsheet, cell by cell, instead of re-keying every position.

Find in PDF

Read & Extract

Find every reference to "expense ratio" across a 100-page fund prospectus before the client call: every match, across every page, in seconds.



Document Stats

Read & Extract

Check the page count and read time on a draft investment policy statement before it goes to the client, a quick sanity check before the real review.

PDF to Markdown

Read & Extract

Convert a fund fact sheet PDF into clean Markdown so it drops straight into the internal research notes, headings and bullet points intact.

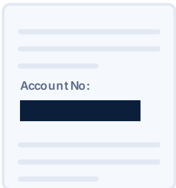
Protect & Secure

Lock what's confidential, remove what shouldn't travel, and prove what changed.

Password

Protect & Secure

Encrypt the client's account statement before it's emailed to them: real password protection, not a folder that just looks locked.



Redact

Protect & Secure

Black out the account number before a statement is shared for a compliance sample review: gone for good, not just covered.

Watermark

Protect & Secure

Stamp "DRAFT, NOT FOR DISTRIBUTION" across every page of the preliminary proposal before it's shared with the client.

Metadata

Protect & Secure

Set the Title, Author, and Review Date fields correctly on the final quarterly review before it's archived: the details a compliance search actually reads.

Strip Metadata

Protect & Secure

Strip the advisor's name and internal file path out of a PDF before it's shared externally with a prospective client.

Bates Number

Protect & Secure

Stamp FA-000001 through FA-001600 across every page of a compliance file production, sequential and consistent, the way the examiner expects it.

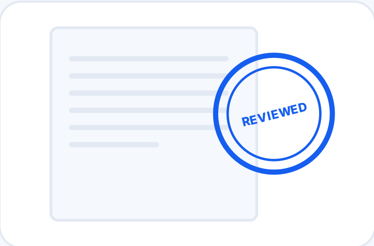
Sign & Mark Up

Sign it, stamp it, mark it up, ready for the client file or the compliance folder.

Fill & Sign

Sign & Mark Up

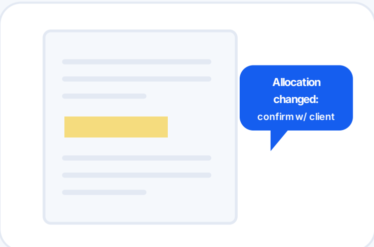
Fill in the client onboarding form fields and add a signature before the account opens, with no printing, signing, or re-scanning.



Stamp Library

Sign & Mark Up

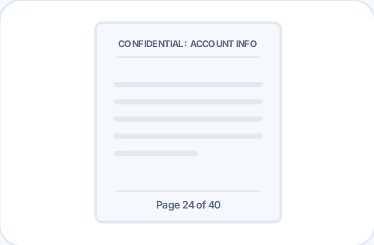
Stamp REVIEWED across the completed disclosure the moment it clears compliance, before it moves to the client file.



Annotate

Sign & Mark Up

Highlight the allocation that changed since the last review and leave a comment for the client, directly on the statement.



Headers & Footers

Sign & Mark Up

Add "Confidential: Client Account Information" and automatic page numbers across a 35-page review before it goes out for distribution.

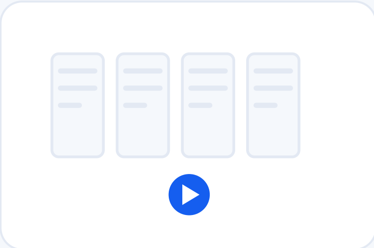
Compare PDFs

Sign & Mark Up

See exactly what changed between last quarter's statement and this quarter's, side by side, before presenting it to the client.

Present & Listen

Take the portfolio review into the client meeting, or into your commute.



Slideshow

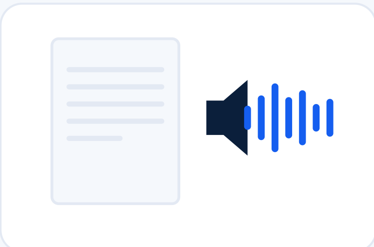
Present & Listen

Present the portfolio review full-screen to the client, straight from the PDF, with no separate deck to keep in sync with the statement.

Presenter Mode

Present & Listen

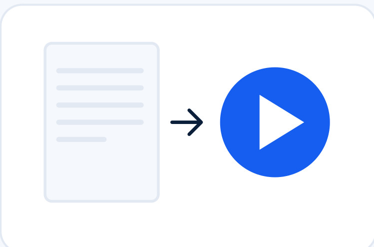
Walk the client through the allocation chart with on-slide markup, pointing straight at the position that matters.



Read Aloud

Present & Listen

Have a 10-page fund prospectus read aloud on the commute in, instead of squeezing the reading in before the client call.



PDF to Audiobook

Present & Listen

Turn the continuing education reading into an MP3 for the commute, with the license renewal deadline closing in.

Optimize Same files. A file size that actually attaches to an email.

Compress PDF

Optimize

A 90MB scanned statement batch won't attach to an email. Compress it down to something that actually sends, without losing legibility.

Merge Layers

Optimize

Flatten the optional-content layers the reporting software leaves behind in its PDF export, so the chart prints clean for the file instead of blank.

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