



Brief Introduction of Company and the Product/Services Provided

Moxo powers client interaction workflows across a diverse set of industries including financial services, consulting, legal, accounting, healthcare, and more. Our customers include companies like Citibank, FIS, AMCK Models, Hibernia College, BNP Paribas, and more.

Today's client engagement activities are stuck in the chaos of fragmented silos — requiring significant manual intervention. Moxo provides a OneStop Client Hub for managing client interactions through modern digital automation. Businesses can streamline deadline-driven client interactions, including account onboarding, account servicing, and exception handling.

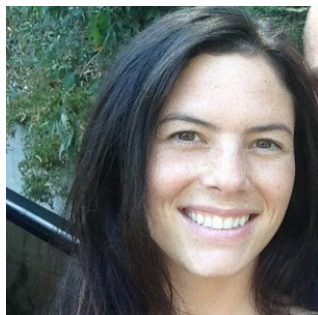
Our team has a rich history of pioneering in the engagement space. Moxo's co-founder and CEO, Subrah Iyar, was the co-founder and CEO of Webex, and Moxo's co-founder and CTO, Stanley Huang, held senior engineering management positions at Cisco Systems and WebEx.

During this webinar, we will share how to control the chaos of managing a client's business. Streamline external projects with digital interaction workflows – from account acquisition, to onboarding, and servicing. Coordinate with customers, vendors, and partners to achieve joint deliverables, track milestones, exchange documents, gather approvals and more.

A slideshow overview will be provided of Moxo's portal software solution and use case examples from accounting firm clients.

Does the company serve clients in the U.S. only; or worldwide? Moxo serves clients around the globe, headquartered in Cupertino, CA, USA. We have over 500 active clients with 50 accounting firm clients

Target Audience	Managing Partners/CEOs, C-Suite Leaders, Service and Industry Line Leaders,
CPE Credits	HR, IT and Marketing Leaders
Registration Fee	No CPE Credit is being offered for attending this webinar Free

Presenter**Whitney Carrillo, Solutions Consultant, Moxo**

Whitney has experience working with consumers and businesses offering financial services and technology solutions. The last three years have been with Moxo, and it's been a very exciting journey watching the software product developed for our clients in financial services.

Whitney is based in San Clemente, California, where she enjoys beach life and family time with her husband, five-year-old son, and their pet chihuahua, Cilantro.