What Software Can I use to work with PDF Documents

Your brokerage has adopted Exchange for your compliance and document storage process.

In order to meet the end goal of smoothly getting your documentation into Exchange you must have a well organized set of client documentation. This Quick Tip document offers some suggestions on what software allows you to create and manage PDF documentation.

There are really three things that you want your PDF software to do:
- Create PDF documents
- Combine PDF documents (sometimes called merge or assemble)
- Extract PDF documents (sometimes called split)

The ability to create PDF documents is pretty common. Typically this functionality is free to download. This functionality allows you to create PDFs from any file format you are likely to need. If you already use a Fax to Email system you likely already receive documents in a PDF format.

The ability to combine and extract PDF documents usually requires you to upgrade from the free creator to a professional version. This ability is the cornerstone of your document management. With the ability to combine and extract your compliance process is simple.

Based on a fairly informal survey of mortgage professionals the most common PDF management software packages are PDF995 (www.pdf995.com) and CutePDF (www.cutepdf.com). Both are inexpensive and easy to navigate.