



Surface for Financial Services



The shifting landscape in Financial Services

Serving client needs in the modern workplace



Employees

Boost employee productivity
via flexible work and AI
experiences



IT

Safeguard organization and
client data



Business

Transform core processes to
better serve clients



Surface is built for the modern workplace



Security

Security from chip-to-cloud—
a zero-trust security model
that starts with Surface devices



Deployment & Management

Zero-touch deployment and
unified management reduce costs
and complexity for a distributed
workforce¹



Productivity

Flexible, premium devices for
innovative customer service
processes, demanding analysis, easy
team collaboration,
and new AI experiences



Design

Product design grounded in human-
centric research and rigorous
testing, and dedicated to inclusivity
and sustainability



Branch employees

Providing a more personal customer experience



Challenges

In a client-facing position, branch workers such as Bank Tellers and Mortgage Lenders face many challenges in their role including:

- Providing a personalized experience for customers
- Communicating information clearly
- Making a good impression on new and existing clients



Solution

To ensure they deliver the best possible experience, branch workers use a **Surface Pro, Copilot+ PC** device for its:

- Lightweight and versatile 2-in-1 form factor
- Powerful processor
- High-resolution touch screen
- Long-lasting battery¹
- Built-in 5G connectivity³ (optional)

Surface Pro for Business

 Copilot+PC



Choice of **Intel® Core™ Ultra (Series 2)** or **Snapdragon X Series** processors, with 40–48 TOPS on the NPU

Choice of **12" or 13" touchscreen** with OLED or LCD display options and **anti-reflective displays** on select models¹⁷

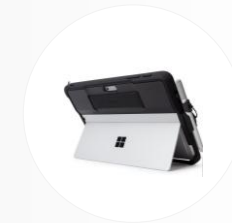
Pair **Surface Slim Pen*** to take digital notes and gather e-signatures

Copilot key on keyboard⁹

Adjustable kickstand and detachable keyboard* (laptop to tablet versatility)

5G connectivity on select models³

Built-in NFC reader on select models⁷



Rugged cases*

Wealth advisors

Helping clients plan their financial futures



Challenges

Busy wealth advisors face challenges in their day including:

- Collaborating with colleagues to determine the best financial plans for clients
- Staying productive when working remote or traveling to clients' locations
- Making a good impression on new and existing clients
- Keeping sensitive client data secure



Solution

To ensure they deliver the best customer service, wealth advisors use **Surface Copilot+ PC** devices that:

- Provide needed performance to run financial software and AI processing, both in the cloud and on-device
- Transform client experiences with touchscreen and pen
- Collaborate effectively with colleagues and clients with Surface Studio Camera and AI-powered Windows Studio effects
- Project a premium image and leave a lasting impression
- Deliver enterprise-grade protection for sensitive data

Surface Pro for Business



 **Copilot+PC**

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Surface Laptop for Business



 **Copilot+PC**

Choice of Intel® Core™ Ultra (Series 2) or Snapdragon X Series processors, with 40–48 TOPS on the NPU

13", 13.8", or 15" PixelSense Flow™ touchscreen displays

Anti-reflective displays on select models¹³

USB-C®/USB4 ports or USB3.2-C ports for connecting multiple external monitors

Remarkably bright with **enriched HDR tech**

Precision Haptic touchpad, keyboard backlight, and **Copilot key**³

Investment analysts

Determining the best investments for financial success



Challenges

As specialists in their field, investment analysts face hurdles unique to their role including:

- Identifying investments that yield optimal ROI
- Creating well-researched advice and complex financial models
- Communicating investment plans to colleagues and clients



Solution

To deliver the advice clients deserve, investment analysts use a **Surface Laptop Studio** device that:

- Handles the compute demands of the sophisticated software and complex financial models
- Provides versatile modes to accommodate various work scenarios
- Easily connects them to teammates
- Seamlessly plugs into their existing displays and hardware

Surface Laptop Studio 2 for Business Laptop mode (*top*), Stage mode (*middle*), Studio mode (*bottom*)



13th Gen Intel® Core™ processors built on the Intel® Evo™ delivering over 2x the power



Instant On and Windows Hello facial recognition



Multitask with up to 64GB of system RAM and ultra-fast SSDs with up to 2TB of storage



Studio Camera with wide field of view and AI-powered Automatic Framing and Eye Contact correction



Surface Slim Pen (magnetically stores and charges beneath the keyboard)

2 USB-C® ports with Thunderbolt™ 4

Executives

Providing leadership across teams



Challenges

Executives face challenges including:

- Overseeing the health of the business and well-being of clients
- Providing leadership across multi-functional teams
- Being a positive reflection of the organization's brand
- Protecting the organization's sensitive data



Solution

To ensure they deliver the best leadership possible, executives use **Surface Copilot+ PC** devices that:

- Offer high-performance computing for collaborative capabilities and new AI experiences
- Provide versatile modes to accommodate various work scenarios
- Help optimize time
- Project a premium image
- Deliver enterprise-grade protection for sensitive data

Surface Pro for Business



 Copilot+PC

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Copilot key on keyboard⁹

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Surface Laptop for Business



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Financial services teams

Working together to improve customer experiences



Challenges

Financial services professionals face challenges including:

- Connecting with colleagues in dispersed branches
- Modernizing customer experience and advisory services
- Collaborating on business development plans and documents
- Presenting sales figures on a screen that is viewable for large groups



Solution

To work more effectively, teams use a **Surface Hub** device that:

- Enables video conferencing over an internet connection for a premium meeting experience for hybrid teams
- Leaves a lasting impression
- Has real-time pen and inking capabilities to whiteboard or markup Microsoft 365 documents
- Delivers 4K quality images on a large, high-resolution screen for easy viewing

Surface Hub 3 for Business



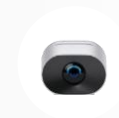
*Stands sold separately



Collaborative canvas
and meetings device
certified for
Microsoft Teams



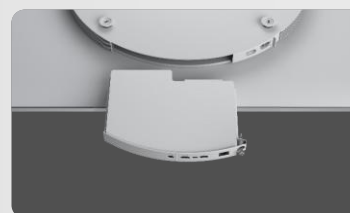
Microsoft Teams
Rooms on Windows



Surface Hub Smart
Camera for a vibrant,
dynamic view of
in-room interactions



Surface Hub Pen



Already have a Surface Hub 2S?
Upgrade with a **Surface Hub 3 Compute Cartridge³**

Surface portfolio

2-in-1s

Versatile Tablet + Laptop devices that provide mobile productivity for workers on the go.

Best for: Branch employees, wealth advisors, mobile workers



Pro, a Copilot+ PC

Lightning-fast speeds and AI accelerated power in an ultra-flexible design

12-inch or 13-inch



Pro 10 5G¹

Get tablet flexibility and laptop performance in the iconic Surface 2-in-1 form factor

13-inch

Laptops

All the power of a static desktop in a sleek, modern form factors built for hybrid and remote workers.

Best for: Information workers, investment analysts, developers, executives



Laptop, a Copilot+ PC

Next-generation AI capabilities in an exceptionally performant ultralight laptop

13-inch, 13.8-inch, or 15-inch



Laptop Studio 2

Powerful laptop delivers speed, graphics and versatility to run business-critical applications

14.4-inch

Large screens

Devices that revolutionized a new category of computing focused on flexibility, collaboration, and mobility.

Best for: Executives, board rooms, hybrid meetings, collaborative teams



Hub 3

Enable teamwork anywhere with this Microsoft Teams-certified meetings platform and modern collaborative canvas