

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

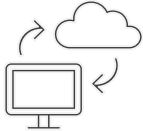


Surface is built for the modern workplace



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 Go** device for its:

- Premium image
- High-resolution touch screen
- Lightweight design
- Powerful processor
- Long-lasting battery



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 new AI experiences without sacrificing mobility
- 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

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

Adjustable kickstand and detachable keyboard (laptop to tablet versatility)

5G connectivity on select models³

Built-in NFC reader on select models⁷



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

Pair Surface Slim Pen* with Surface Pro Flex Keyboard* and use keyboard attached or detached²

Copilot key on keyboard⁹

 Copilot+PC

Surface Pro for Business

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

13.8" or 15" PixelSense Flow™ touchscreen displays

Remarkably bright with enriched HDR tech

Precision Haptic touchpad, keyboard backlight, and Copilot key³



Anti-reflective displays on select models¹³

USB-C®/USB4 ports for connecting multiple external monitors

 Copilot+PC

Surface Laptop for Business

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 Pro and/or Surface Laptop** devices that:

- Provide needed performance to run financial software and new AI experiences without sacrificing mobility
- 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

13" PixelSense™
Flow touchscreen and
anti-reflective display

Surface Slim Pen*
Stored securely in
Surface Pro Keyboard*

Built-in NFC reader⁹

Optional 5G connectivity⁴



Intel® Core™ Ultra processors
with Intel® AI Boost NPU

Adjustable kickstand and
detachable keyboard
(laptop to tablet versatility)

Copilot key on keyboard¹⁰

Surface Pro 10 for Business

13.5" or 15" PixelSense™
touchscreen displays

Intel® Core™ Ultra processors
with Intel® AI Boost NPU

Anti-reflective displays

Smart card reader
offered on 15" in US
& Canada only

Large glass trackpad,
backlit keys, and
Copilot key¹⁰

USB-C® and
Thunderbolt™ 4
to connect to
external monitors



Surface Laptop 6 for Business

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

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

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

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 Laptop** 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

13.8" or 15" PixelSense Flow™
touchscreen displays

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

Remarkably bright with
enriched HDR tech

Anti-reflective displays
on select models¹³

Precision Haptic touchpad, keyboard
backlight, and Copilot key¹⁰



USB-C®/USB4 ports
for connecting multiple
external monitors

 Copilot+PC

Surface Laptop for Business

13.5" or 15" PixelSense™
touchscreen displays

Intel® Core™ Ultra processors
with Intel® AI Boost NPU

Anti-reflective display

Large glass trackpad,
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Copilot key¹⁰

Smart card reader
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USB-C® and
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Surface Laptop 6 for Business

Financial services teams

Working together to improve customer experiences

Challenges

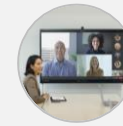
Financial services professionals face challenges including:

- 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



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



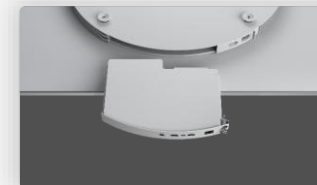
Hub 3 85"



Hub 3 50"

*Stands sold separately

Surface Hub 3 for Business



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



Pro 10

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



Go 4

The smallest, lightest Surface with touch and ink capacitive PixelSense™ display

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



Laptop 6

Sleek, lightweight, touchscreen laptop with the style, speed, and performance to do it all



Laptop Studio 2

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



Laptop Go 3

Exceptional value for the style, performance, and battery life expected from Surface

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