

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 4** device for its:

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

10.5" PixelSense™
touchscreen display

Our fastest
Surface Go yet
with Intel®
Processor N200



Rugged cases with
antimicrobial protection

Rear-facing 8.0-
megapixel HD camera
to scan documents



Surface Pen* for
digital signatures



Surface Go 4 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 10 and Surface Laptop 6** 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 2*
Stored securely in
Surface Pro Keyboard*

Built-in NFC reader
on select models



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

Adjustable kickstand and
detachable type cover
(laptop to tablet to
portable digital canvas)

Copilot key on keyboard¹⁰

Surface Pro 10 for Business

13.5" or 15" PixelSense™
touchscreen displays

Anti-reflective displays

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

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

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 2** 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 2 (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** 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

Snapdragon® X Series processors
with Qualcomm® Hexagon™ (NPU)
with 45 TOPS

Remarkably bright with
enriched HDR tech

Precision Haptic touchpad, keyboard
backlight, and Copilot key¹⁰



USB-C®/USB4
ports and support
for up to 3
external monitors

Surface Laptop Copilot+ PC for Business

Large 28" PixelSense™
touchscreen

11th Gen
Intel® Core™
H-35 Processor

Lower and raise
display with the
Zero Gravity Hinge



Includes Surface Pen,
Surface Keyboard,
and Surface Mouse

Surface Studio 2+ 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 3** device that:

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



Collaborative canvas and meetings device certified for Microsoft Teams



Surface Hub Smart Camera



Surface Hub Pen



Surface Hub 3 85"

*Stands sold separately



Surface Hub 3 50"

Surface Hub 3 for Business

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 10

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



Pro Copilot+ PC

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



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 6

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



Laptop Copilot+ PC

Next-generation AI capabilities in an exceptionally performant ultralight laptop



Laptop Go 3

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



Laptop Studio 2

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

Large screens

A family of devices that revolutionized a new category of computing focused on flexibility, collaboration, and mobility.

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



Studio 2+

Professional-grade performance on a versatile **all-in-one device** with **strikingly large touchscreen**



Hub 3

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

Images not to scale