

Kia Ora there,

Find out what the team at 2Shakes have been working on, and what you can expect to see in the upcoming weeks.

Coming Soon: 2Shakes Referral Program

Do you love 2Shakes and think everyone should be using it?

We want to reward you!



We really appreciate how many of you tell other businesses about 2Shakes. We understand how valuable a referral from an existing customer can be, so thank you! To make it easier, in the coming weeks we will be launching the **2Shakes Referral Program!** And as a wee thank you, we will reward you for businesses you refer that become customers. Full program details coming soon, so stay tuned 👁️

#BOOKKEEPCON21



2Shakes will be heading to Bookkeepcon this year and we'll be presenting! Hope to see you in Rotorua for the 30th and 31st July. It's not too late to get your tickets! Check out the [Institute of Certified NZ Bookkeepers' website](#) for more event details.

App Updates

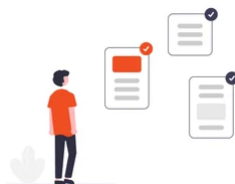
Have you noticed the newest updates in 2Shakes? We have been deploying more improvements like address finder, lock user functionality, as well as enhancements to single entity agreements with AML.

- **Address Finder** - all address fields in 2Shakes now auto-fill, saving you and your clients' time and avoiding errors.

- **Lock user** - administrators can now disable accounts when staff leave, or unlock accounts when needed, from the Business Profile [read more >](#)
- **Single Entity Agreements with AML** - you can now select all beneficial owners on a single entity agreement to sign on behalf of the client if required.

To stay up to date with our latest features, visit our [New Features and Updates page](#). And huge thanks to everyone who has suggested improvements - we're listening!

What's next for 2Shakes?



- **Upcoming App Improvements**

Based on your feedback, work is underway on some cool updates to Ongoing Customer Due Diligence (OCDD) in 2Shakes! We'll have more details soon.

- **2Shakes is Looking**

We are currently looking for someone to fill a Business Development Manager position at 2Shakes. If you know someone that might be suitable please send them [this link](#) thanks!

2Tips

- For Enhanced Due Diligence (EDD), 2Shakes now allows you to record when Source of Wealth or Proof of Funds has been collected, and securely store it in our cloud platform.
- A recording of the Trust CDD webinar is now available on our website, [check it out!](#) Thanks again to everyone who tuned in - it was great hearing so many of you found it helpful.

As always, please let us know if we can help in any way - you can email support@2shakes.co.nz or use our [Contact page](#), and thanks again for all your support!

All the very best,
The 2Shakes Team



2Shakes Limited

W: www.2shakes.co.nz

Client Onboarding Automation | AML Due Diligence.

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2Shakes Limited, Level 4, 85 Ghuznee Street, Te Aro, Wellington, New Zealand 6011

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