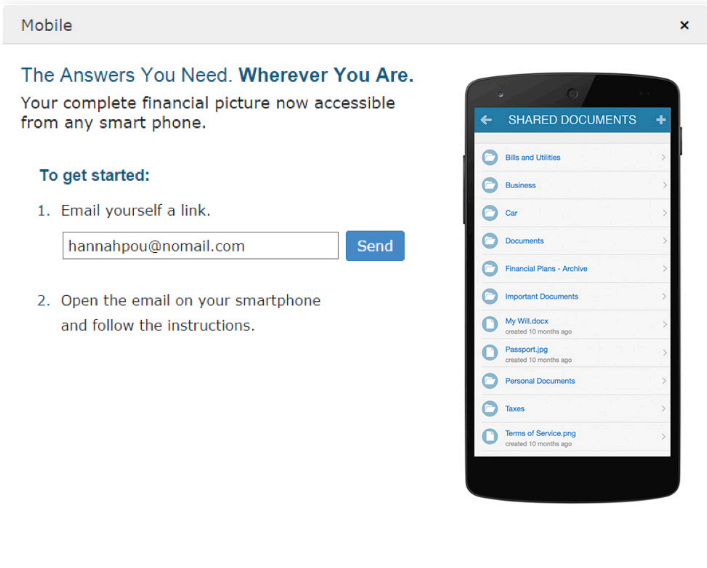
Client Site Vault

CLIENT SITE VAULT

The Vault is a searchable repository in which files are stored for your review, and where you & your clients can store files. Files may include your financial plan, prospectuses, reports, and spreadsheets. Vault files are separated into several different folders by content.

The client can save files and create sub-folders in two folders: My Documents and Shared Documents. The My Documents folder is for storing private files. The Shared Documents folder is for saving files that the client wants to securely share with their advisor.



ACCESSIBLE FROM MOBILE

Since the client site is mobile, your clients can access the vault from wherever they are! Going digital with important documents helps ease the mind. If there's an emergency, documents like wills, deeds, and proof of identification can be accessed digitally at your fingertips.

SECURE

- Our system uses a 256-bit Secure Socket Layer to scramble data
- Routine Security Testing by third party security auditors
- Data secured at geographically separated data centers

STORAGE CHECKLIST

- Personal Documents: Driver's License, Passports, Birth Certificate, Social Security Info
- Media: Video Recordings, Photos, Audio Recordings
- Legal Documents: Wills, Deeds, Trusts, Buy/Sell agreements, Marriage License, Title to Home/Auto/Boat
- Other: Tax Returns & W-2 Forms, Pay Stubs,
- Employment Benefits, Insurance Policies