

Industry Solution

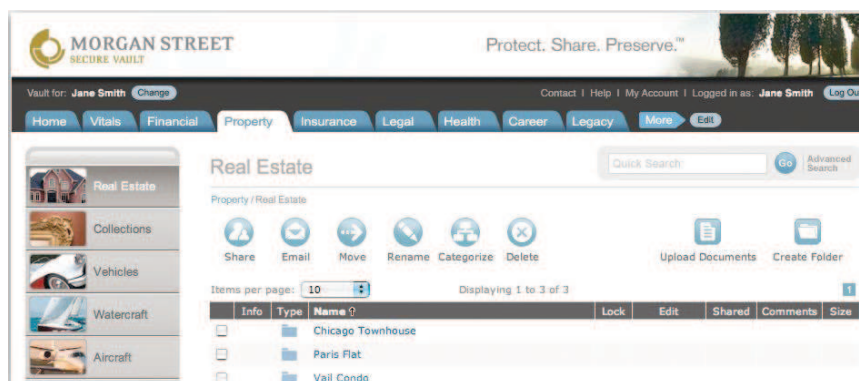
Personalized Online Vault for the Banking Client

Create additional revenue streams, increase customer loyalty, and distinguish your services. Help your clients organize, share and protect life's essential information.

Protect. Share. Preserve.

As wealth increases, managing life becomes more complex for your clients—with a multitude of advisors and thousands of pages of financial, legal, business, and personal documents.

Morgan Street Document Systems innovative Secure Vault helps individuals and families protect and share all of the information that's critical to their lives. In addition to financial and legal information, clients can use their vaults to preserve and share personal legacy items such as photographs, family trees, memoirs, correspondence, personal histories and family videos. Secure Vault is an easy-to-use, web-based archive that individuals and their advisors may access anytime and anywhere - essentially an electronic, virtual safe deposit box.



Secure Vault enables your clients to:

- Have 24/7 secure access to their critical information from any location.
- Easily stay connected by sharing information over generations and geographic locations.
- Eliminate the hassle of copying, faxing and shipping documents by electronically sharing them.
- Conveniently collaborate with advisors.
- Go paperless to eliminate storage and help the environment.

Secure Vault, a Profitable, Value Add Solution

Secure Vault delivers a personal information management platform that enables you to differentiate your services and deepen your client relationships. Linked to an online banking portal, our secure vault facilitates seamless collaboration between your account representatives, the client, and key advisors such as attorneys and accountants. By providing your clients with personal vaults linked to their online banking portal, you can:

- Deepen client relationships and improve retention.
- Become the focal point of a harmonious network of advisors focused on serving the client.
- Conveniently interact with clients and their advisors about their wealth management needs.
- Easily go paperless and save significant printing, storage and mailing costs.



Morgan Street Document Systems

Morgan Street Document Systems is the premier provider of personalized, web-based document services to organize, share, and protect life's essential information. Morgan Street's Secure Vault helps clients protect and share personal legacy items, as well as documents critical to business, financial, and legal matters. Its clients include individuals and families, family offices, insurers, banks, wealth advisors, and brokers.

To learn more about Morgan Street and the services we provide, please contact us at **1.866.551.MSDS**, info@morganstreetdocuments.com or visit our web site at www.morganstreetdocuments.com.



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