



Welcome to a life less complicated.



MORGAN STREET
DOCUMENT SYSTEMS

Protect. Share. Preserve.™

As your wealth increases, managing life becomes more complex. Most high-net-worth individuals today have a multitude of advisors and thousands of pages of documents and digital assets—all critical to their business, financial, legal and personal matters. So having an organizational system capable of handling the load becomes essential.

Looking after life so you can live it.

Morgan Street Document Systems is a personalized, web-based management service that brings all the documents at the center of your life into one simple, completely secure, digital vault. We can help you simplify your life today and ensure a smooth transfer of your legacy to subsequent generations. In addition to financial and legal information, our clients are using their vaults to preserve and share more personal legacy items—photographs, family trees, memoirs, correspondence, personal histories and family videos.



Access anytime from anywhere. Our web-based interface is always on, giving you instant access via the Internet. Any document you need will always be available, with all your documents securely stored in one place.



Find everything. You can search for documents by name, type, date or by a simple text search.



Share your documents with those you trust. Grant access to specific documents to instantly share with your family members and advisors, avoiding the need for shipping and/or faxing.

Everything in one place.

Our user interface makes it easy to organize, access and share your vital information.

The screenshot displays the Morgan Street Secure Vault interface. At the top, the logo "MORGAN STREET SECURE VAULT" is on the left, and the tagline "Protect. Share. Preserve.™" is on the right. Below the logo, the user's vault name "Jane Smith" is shown with a "Change" link. On the far right, there are links for "Contact", "Help", "My Account", and "Logged in as: Jane Smith" with a "Log Out" button.

A horizontal navigation bar contains tabs for "Home", "Vitals", "Financial", "Property", "Insurance", "Legal", "Health", "Career", "Legacy", "More", and "Edit". The "Property" tab is currently selected.

On the left side, there is a vertical sidebar menu with icons and labels for "Real Estate", "Collections", "Vehicles", "Watercraft", and "Aircraft". An "Edit" button is located at the bottom of this sidebar.

The main content area is titled "Real Estate" and includes a "Quick Search:" input field with a "Go" button and a link to "Advanced Search". Below the title, there are icons for "Share", "Email", "Move", "Rename", "Categorize", and "Delete", along with "Upload Documents" and "Create Folder" buttons.

A table lists items with columns for "Info", "Type", "Name", "Lock", "Edit", "Shared", "Comments", and "Size". The table shows three items:

Info	Type	Name	Lock	Edit	Shared	Comments	Size
<input type="checkbox"/>	Folder	Chicago Townhouse					
<input type="checkbox"/>	Folder	Paris Flat					
<input type="checkbox"/>	Folder	Vail Condo					

Below the table, there is a "Select All | Unselect All" link and a page indicator "1".



A personal touch.

Morgan Street Document Systems brings you state-of-the-art technology with a personal touch. This is why we connect you with a Personal Archivist™, a trained records-management professional who will perform all of the practical tasks of managing your documents while you maintain control of your affairs from the very beginning.



From inventory and scanning to uploading and classification, your Personal Archivist will set up and maintain your online vault as well as train your advisors.



Your Personal Archivist will work with you to keep your Secure Vault up-to-date by tracking, editing and filing your documents to your specifications.

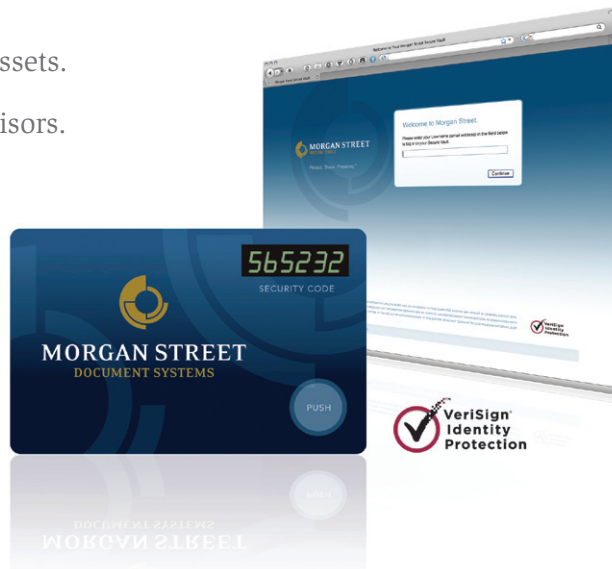


Your Personal Archivist is always on call, and conversations with any Morgan Street associate are completely confidential.

Protect your information assets.

Share with family and advisors.

Preserve your legacy.



Information assurance you can depend on.

Insurance policies protect your physical property, but what about your valuable information assets? Morgan Street assures your peace of mind by securely storing all of your vital information and providing instant access to it—no matter where you may be. To do this, we use some of the most advanced security methods in the world. All of your documents are protected while being scanned, uploaded and stored.

To provide the same level of protection for your documents as you expect for your financial investments, Morgan Street Document Systems' data centers follow the same security protocols as America's top financial institutions.

- Our solution is hosted at a Tier 3 data center that is fully compliant with banking industry data center requirements including SAS-70 Type II.
- Your identity is protected by a two-factor authentication procedure utilizing a personal identity card issued by the VeriSign® Identity Protection (VIP) Network.
- Maximum data security is provided by encrypting data along the complete transmission path between the data storage device and the user.
- Multiple backups are used to protect your data from natural disasters or other unforeseen events.

Where do you go from here?

Life is complicated enough without needing to keep track of every little detail. With Morgan Street Document Systems, you can focus on the important things. Simplicity. Peace of mind. And the freedom to enjoy life's finer things.

The path to a life less complicated starts with a 30 minute personal assessment by a Morgan Street Personal Archivist™. To learn more about Morgan Street and to arrange your personal assessment, please contact our CEO, Craig Smith, at craig.smith@morganstreetdocuments.com or call 1.866.551.MSDS

“Good order is the foundation of all things.”

EDMUND BURKE

Working with hundreds of high-net-worth individuals and their families, we have developed a comprehensive catalog to index all of your valuable personal information. This catalog can be easily tailored to reflect your specific interests and situation.

FINANCIAL DOCUMENTS

Financial plans
Stock certificates
Private equity investments
Financial statements

LEGAL & ESTATE DOCUMENTS

Wills
Trusts
Power of Attorney
Titles and Deeds
Advance medical directives
Family foundation

INSURANCE DOCUMENTS

Policies
Declarations
Schedules
Appraisals

LEGACY DOCUMENTS

Photographs
Correspondence
Personal histories
Articles and Publications

And the list goes on...



MORGAN STREET
DOCUMENT SYSTEMS