

STORE & SHARE FINANCIAL DOCUMENTS



Maintain compliance with record-keeping laws while enabling your teams to access, edit, and share information safely.

Your Challenges

- Your employees want to work on multiple devices, but you want to keep documents and data safe to stay compliant.
- Sharing documents with USB drives and CDs is time consuming, inefficient, and puts data at risk.
- Not all organizations are able to commit to storing all corporate data in the cloud due to compliance issues.

Solution Features

- Bank-level, 256-bit encryption for data in transit, at rest, control over files and folders, and remote wipe for lost devices.
- Document sharing with an Outlook plugin or web app.
- Choice of where to store data to ensure compliance & alignment with IT strategy.

Benefits

- Enable mobile workspaces while keeping your documents and data secure.
- Share documents quickly and easily, and save money on paper, ink, and postage.
- Gain peace of mind knowing your data is secure.

ACCESS FILES FROM CUSTOM APPLICATIONS



Complement your investments in custom applications, make your team more efficient, and improve business performance

Your Challenges

- RIAs invest in custom applications to run their firm more efficiently, but were built without file access and sharing in mind.
- Further customization of apps for file access and sharing requires significant investment.
- Consumer-grade file-sharing services don't work well with virtualized applications or desktops.

Solution Features

- Enable access to multiple data repositories, including Office 365, SharePoint, and network drives.
- On-demand and device sync updates files across applications and devices.
- Optimize file syncing for virtual desktops.

Benefits

- Minimize capital investment in custom applications
- Ensure users have access to the latest versions of files, regardless of the application or device last used to access or update them.
- Maximize the performance of your virtual applications and desktops.

SECURE FILES & REPORT ON USAGE



Take control of your documents and data with oversight, reporting, and auditing of document sharing

Your Challenges

- 70% of organizations report employees using unauthorized file-sharing services, placing documents outside of corporate control.
- Lack of visibility and oversight into who is sharing and viewing specific files.
- Potential compliance and regulatory violations due to absence of oversight.

Solution Features

- Comprehensive reporting and oversight for all file-sharing activities.
- Integrations with Data Loss Prevention systems like McAfee and Symantec
- Follow-the-file security with Information Rights Management.

Benefits

- Gain insight into which files are being shared and who is viewing them.
- Prevent exposure of confidential information like credit cards or personal identification numbers.
- Ensure files can only be accessed and viewed by intended recipients.

TRACK & SIGN INVOICES AND CONTRACTS

Go paperless and streamline the feedback, approval, and signature workflows with a single solution.

Your Challenges

- Complex and time-consuming invoice and contract management processes.
- Managing feedback and approvals when multiple team members collaborate on a single document.
- Collecting and storing signed, legally binding documents via courier, fax, or email.

Solution Features

- Office 365 integration: enabling teams to collaborate, provide feedback, and send documents for approval.
- Legally binding electronic signatures with no downloads or plugins.
- Scalable and secure data storage options.

Benefits

- Save inbox storage space and put a stop to endless e-mail approval chains.
- Save money and the hassle of postage, couriers, and faxes with an easy-to-use digital solution.
- Ensure your sensitive data is always stored safely and is easy to find.



ATTRACT & RETAIN TOP TALENT



Enhance your employer brand by offering your employees a tool to facilitate working anywhere on any device

Your Challenges

- Competition for financial talent is fierce; organizations look for an edge to be seen as an employer of choice.
- Perks like ping-pong tables don't cut it anymore. Employees want tools for mobility and work-life balance.
- Budgets are tight; you need meaningful tools that won't break the bank.

Solution Features

- Easy-to-use tool lets employees focus on productivity instead of process.
- Applications for Android, iOS, and Windows
- Cost-effective tool with a consumer-like experience you already know and love.

Benefits

- Commitment to employee success by providing them with the tools they need to flourish.
- Enable "Bring Your Own Device" and employee mobility.
- Increase productivity and utilization with minimum capital investment and employee training.