

Client Vault Features and Benefits

FMG takes the confidentiality of pertinent client information seriously. The client vault is our response to improved security of electronic communications with clients. The online “client vault”, is accessible from any computer, and enables storing and sharing of important financial documents with us, or other trusted professionals you choose. Keep copies of your documents like wallet contents, emergency contacts, proof of address, deed/lease to home, passports, birth certificates, insurance policies safe from damage, and accessible at a moment's notice.

The Client Vault offers extraordinary security. Files are encrypted while they are uploaded or downloaded and they are stored using 256-bit encryption.

- 256-bit Encrypted Secure Document Management
- Secure Access for Outside Professionals
- Automatic Document Expiration
- Drag & Drop Documents from Desktop to Vault
- Fully Redundant Infrastructure
- 24/7 Password reset feature
- E-mail Notification when new files are added.

We initially setup your Vault with the following documents:

- Trailing 3 years of tax returns (2006-2008), if available.
- Trailing 3 years of portfolio review and investment reports
- Estate Planning Documents (Wills, Power of Attorney and Trust documents, as applicable)
- Additionally, you will have the ability to upload other documents you wish to store in your vault, up to a total 25MB storage limit.

FMG Client Vault Setup and Use

Initial Setup

- Client will get an email with link and temporary password. Click link and client must change password to 7 or more characters, containing a number AND special character (!@%&*, etc). After a permanent password is selected, client can login using new password.

Ongoing login:

- Logon through www.fmgonline.com, under “Client Vault” link on lower left side
- Each time you login, it will display any new or “unread files”.

Viewing Documents:

- To see a listing of vault documents, Click on “My documents” and then click a folder. All documents available in that folder will be listed, with a description, size and delete date.
- To open or view a document, click on the filename.
- Once the file is opened, you can print, search file contents, or save to your computer’s local hard drive by using the File (Save as, Print) or Edit (Find) menus in the Adobe Acrobat program.

Uploading Documents:

Uploading confidential or sensitive documents to the vault is more secure than email.

- Clients can upload documents by selecting MY DOCUMENTS within the Vault, then clicking the appropriate folder to upload a file. Then, click “upload” above the listing of files/folders. *it is important to be located in the correct folder before uploading to avoid extra work of moving files between folders (which is possible using the “explorer view”)
- The Upload document screen should appear and you can “BROWSE” to select a file on your computer, then click OK to upload into your vault. Optional: You can provide additional information such as Title, Description and Delete Date before pressing OK.
- FMG will receive a notification that you have uploaded a new document, and if applicable, we will respond with guidance or feedback.

Deleting Documents:

When FMG adds a file to your vault, a “delete date” of 3 years for tax returns and investment summary reports will be selected to preserve space in your vault. We will maintain a complete history of ALL your financial documents internally, which can be uploaded upon request.

- While viewing a list of files, place your mouse over a file name, a box will appear with a drop down box at right. Select the arrow down and select DELETE.

Sharing with Other Professionals:

-This portion of the Client Vault is still in testing. If you are interested in the ability to share certain files with other professionals, please contact Rob Siegmann or Chrissie Smith at FMG.

The **SHARED DOCUMENTS** Tab provides FMG the ability to share non-personal documents with ALL clients using the vault, such as an Economic Outlook, newsletter, or articles of interest.

Clients can create and grant professionals access to one or many folders

First step is to create a professional by selecting “MANAGE PROFESSIONALS” on left side

Next, select “Create Professional” (blue link, upper right), and complete the fields marked with red asterisks.

Click create and an email will be sent to the professional (It is recommended to give the professional notice to expect the email and ask what “username” they would prefer to us)