

VaultStreet Affiliate Programs

Secure Financial Record Keeping Made Easy



VaultStreet is an innovative, online financial record-keeping service that will help you generate revenue by streamlining online personal financial record storage for your clients - the 28 million households nationwide with incomes over \$60,000 - who struggle to manage a mix of online accounts at banks, brokerages and mutual funds.

Educated, environmentally-aware and focused on managing their assets, these consumers face a paper gap created by the need to organize and store paper financial records and manually re-enter information into tax organizers and online tax and budget planning software programs. This paper gap cost consumers an estimated \$79 billion in wasted time in 2000, at an average cost per household of \$2,055.

By joining VaultStreet's Affiliate Program, financial planners, tax preparers, lawyers and other trusted financial partners - our affiliates - will be able to generate referral revenues by offering clients valuable new levels of service and assistance with the transition to paperless financial management. VaultStreet give clients access to a secure, online 'electronic file cabinet' that automatically collects and organizes financial documents by source, date created and gathered, and type of document. Your clients can create a personalized view of all documents collected into a VaultStreet account, add custom folders with a mouse click and assemble documents from a variety of sources in a single location.

Benefits for affiliates

- Encourage clients to go paperless with reduced risk
- Immediately and cost-effectively create deeper relationships with clients
- Create new revenue streams through our affiliate program
- Lower printing and mailing costs associated with tax organizers
- Increase customer satisfaction and service levels

Benefits for consumers

- Saves time
- Protects privacy
- Automatically and securely gathers financial records in one place
- Reduces reliance on paper
- Enables consumers to quickly find financial records
- Provides a third party source for recovery of financial documents in case of disaster
- Share financial documents with trusted advisors

VaultStreet

A service of Docuentic, LLC
1639 11th Street #170 - Santa Monica, CA 90404
301.450.3836 - www.vaultstreet.com

According to Javelin Strategy & Research:

- » 61 million households bank online - 53 percent of the US population
- » Online banking will grow at a compound annual growth rate of 6.1 percent through 2012



VaultStreet helps financial, tax and legal advisors increase customer satisfaction by making it simple and secure for their clients to manage both conventional and paperless financial documents. Through a single online filing system, you will be able to offer services and tools to clients that streamline record keeping, reduce the effort and cost associated with acquiring financial documents from multiple web sites - banks, brokerages and mutual funds - and reduce the amount of time spent collecting, organizing, storing and sharing documents with trusted advisors.

With VaultStreet, affiliated financial services providers will be able to:

- Help customers learn to use online financial services and reduce reliance on paper documents
- Generate revenue through referrals to VaultStreet
- Provide online acquisition, authentication and storage of documents as a value-added service to clients
- Provide clients with the security, tools and confidence to switch to paperless documents
- Help clients streamline financial record storage
- Support collection of records from online accounts at banks, brokerages and mutual funds
- Streamline tax time, loan applications and other financial events
- Provide new levels of service to clients

VaultStreet provides:

- Flexible, scalable, secure, encrypted protection for online financial documents
- Automated online financial document collection
- Authentication of document originality
- Centralized records retention
- The ability to share documents with you, and your clients' network of trusted third party advisors

Accounts supported by VaultStreet

- Bank checking and savings accounts
- Credit cards
- Managed and non-managed assets
- Brokerage and investment accounts
- Life insurance
- 401K
- Mutual funds
- 529
- IRA
- Annuities
- Utility bills

Key VaultStreet Client Features

- **Automatic collection and authentication** of financial documents from multiple online sources
- **Customizable organization** of documents
- **Quick, intuitive search**
- **Secure and encrypted**
- Enables clients to **securely share documents** with trusted tax, financial and legal advisors
- **Easy, 24/7 online access** to stored documents

Become a VaultStreet Affiliate today

As a VaultStreet affiliate, you'll be paid for clients who are referred to our service, register and create a paid subscription.

To explore opportunities to join VaultStreet's Affiliate Program, or to see a demo of VaultStreet, please contact Paul Hutchins, vice president of strategic relations and business development, at 214.500.7575 or phutchins@vaultstreet.com.