

VaultStreet and Partners

Secure Financial Record Keeping Made Easy

VaultStreet is a secure online financial record-keeping service that enables online banks, brokerages, mutual funds and credit card companies to provide consumers with new levels of service while helping them make the transition to online, paperless financial management. VaultStreet provides customers with the ability to consolidate and automate the collection, authentication, organization and storage of paperless, electronic financial records from a variety of sources, with the added benefit of enabling secure sharing of online documents with their trusted advisors.

Available as a value-added, white-label service, VaultStreet helps our partners generate revenues from referrals while improving service levels to customers. Our secure, encrypted online repository acts as an electronic file cabinet for customer documents. VaultStreet automatically collects and organizes customer financial documents by source, date created and gathered, and type of document. An institution's customers 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.

VaultStreet makes it simple, safe and secure for an institution's customers to switch to paperless statements while maintaining financial documents in a highly-available, authenticated and secure online repository.

Benefits for financial institutions

- Encourage customers to go paperless with reduced risk
- Lower printing and mailing costs associated with paper statements and records
- Increase customer satisfaction and retention
- Offer increased service levels while generating new revenue streams for the institution
- Support online banking initiatives

Benefits for consumers

- Saves time
- Protects privacy
- Automatically and securely gathers financial records in one place
- 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

“ Paper checks, bills and statements are set to become a historical artifact with consumers as banks, credit card providers and other companies increasingly offer online services that are ‘green, safe and practical... ”

James Van Dyke
President, Javelin Strategy & Research



VaultStreet

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VaultStreet helps financial institutions increase customer satisfaction by making it simple and secure to manage both conventional and paperless financial documents. Through a single online filing system, financial institutions will be able to offer services and tools to customers 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 forwarding documents to trusted advisors.

With VaultStreet financial services providers will be able to:

- Provide online acquisition, authentication and storage of documents as a value-added service to customers
- Provide customers with the security, tools and confidence to switch to paperless documents
- Help customers streamline financial record storage
- Support collection of records from online accounts at banks, brokerages and mutual funds
- Generate revenue with new, high-value services
- Help consumers make the transition to online banking

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 a network of trusted third party advisors

Key Features

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

To learn more about partnership opportunities with VaultStreet or to see a demo, please contact Paul Hutchins, vice president of strategic relations and business development, at [214.500.7575](tel:214.500.7575) or phutchins@vaultstreet.com.

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