

# Morgan Stanley

# Welcome to Digital Vault

Digital Vault lets you easily and conveniently manage and share life's most important documents, such as wills, deeds and estate plans, as well as financial statements and tax filings.



### Easy Document Sharing

You and your Financial Advisor team can now share documents with each other, and it's as easy as uploading a file.



### Convenient Access

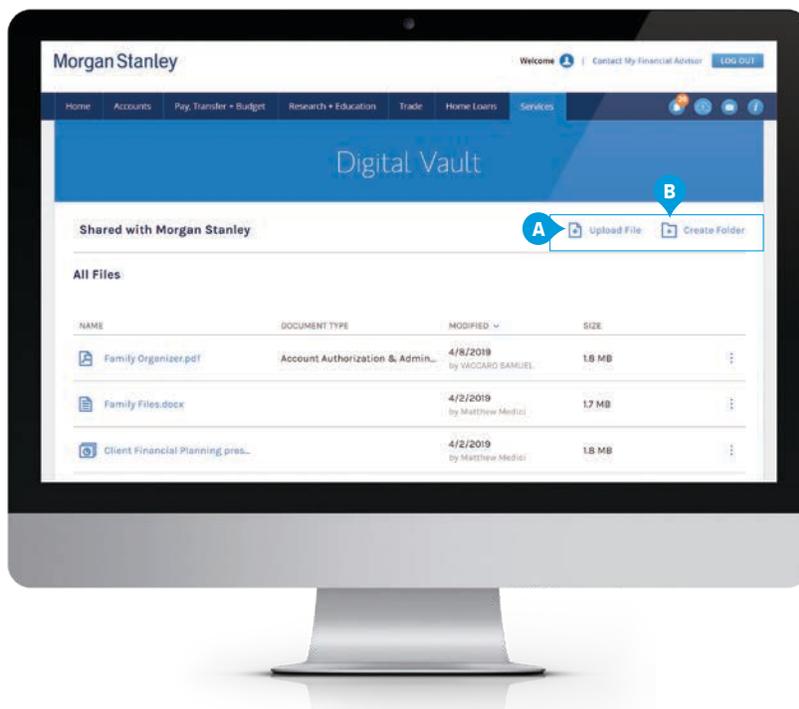
Files can be accessed across your devices, whether you use a PC, Mac®, iPad®, iPhone® or Android.™



### Encrypted Files

All documents uploaded are scanned for viruses and encrypted for an extra layer of security.

## How it Works



### **A** UPLOAD FILE

Click on Upload File or drag and drop a file.

Select the document type (e.g., Tax Document, Legal Document).

Click on **Upload**.

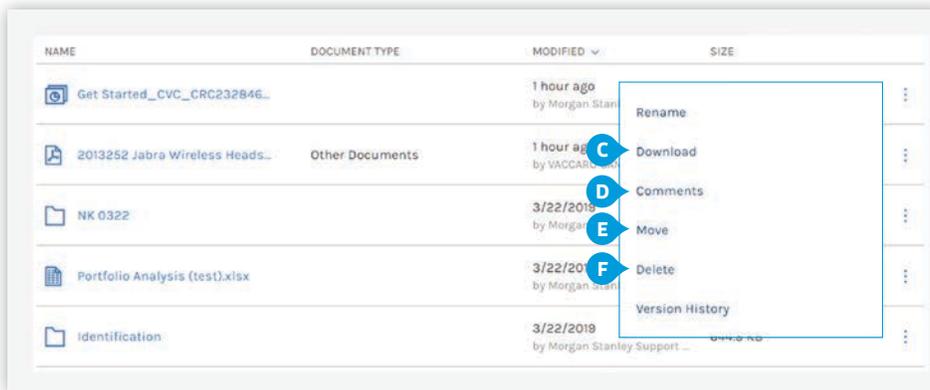
Your file will be reviewed by your Financial Advisor team.

### **B** CREATE FOLDER

Click on Create Folder.

Name the folder.

Click on **Save**.



### Additional Features and Tips

Your Financial Advisor team will be automatically notified when you upload new files.

Always keep your original copies of documents, even after uploading them.

You will be notified when your Financial Advisor team uploads new files.

#### **C** DOWNLOAD FILE

Click on the ellipsis next to a file or folder and select **Download**.

#### **D** COMMENTS

Add Comments to a Document.

Click on the ellipsis next to a file or folder and select **Comments**.

#### **E** MOVE FILE OR FOLDER

Click on the ellipsis next to a file or folder and select **Move**.

Choose a destination folder and then click on **Move**.

#### **F** DELETE FILE OR FOLDER

Click on the ellipsis next to a file or folder and select **Delete**.

Confirm by selecting **Delete** again in the next window.

Note: Once a document is deleted, it cannot be recovered.

## Get Started Today

Log in by following the instruction options below.

**Morgan Stanley Online**—Click on **Services** and then select **Digital Vault** from the drop-down menu.

**Morgan Stanley Mobile App**—Select **Digital Vault** from the menu options.

The Morgan Stanley Digital Vault (“Digital Vault”) is accessible to clients with dedicated Financial Advisors. Documents shared via the Digital Vault should be limited to those relevant to your Morgan Stanley account relationship. Uploading a document to the Digital Vault does not obligate us to review or take any action on it, and we will not be liable for any failure to act upon the contents of such document. Please contact your Financial Advisor or Branch Management to discuss the appropriate process for providing the document to us for review. If you maintain a Trust or entity account with us, only our certification form will govern our obligations for such account. Please refer to the Morgan Stanley Digital Vault terms and conditions for more information.

The Morgan Stanley Mobile App is currently available for iPhone® and iPad® from the App Store® and Android™ on Google Play™. Standard messaging and data rates from your provider may apply. Android and Google Play are trademarks of Google Inc. Apple®, the Apple logo, iPhone®, iPad® and iPad Air® are trademarks of Apple Inc., registered in the U.S. and other countries.

Tax laws are complex and subject to change. Morgan Stanley Smith Barney LLC (“Morgan Stanley”), its affiliates and Morgan Stanley Financial Advisors or Private Wealth Advisors do not provide tax or legal advice. Individuals are urged to consult their personal tax or legal advisors to understand the tax and legal consequences of any actions, including any implementation of any strategies or investments described herein.