# **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.

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#### 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**

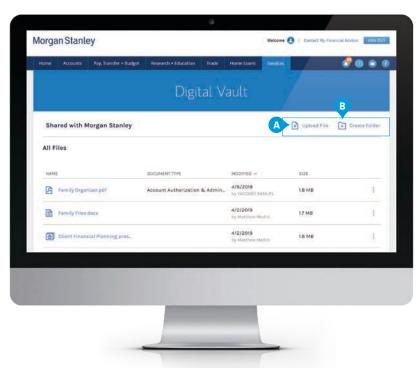
Files can be accessed across your devices, whether you use a PC, Mac<sup>®</sup>, iPad<sup>®</sup>, iPhone<sup>®</sup> or Android.™



## **Encrypted Files**

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

## How it Works



UPLOAD FILE
Click on Upload File or drag and
drop a file.
Single and/or multi-page documents
can be scanned and uploaded using an
iOS device. Simply click the + symbol
in Digital Vault on the mobile app, and
follow the instructions.
Select 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**.

NAME DOCUMENT TYPE		MODIFIED V SIZE		
Get Started_CVC_CRC232846		1 hour ago by Morgan Stan	Rename	
2013252 Jabra Wireless Heads Ot	her Documents	1 hour ag C	Download	
NK 0322		3/22/2019 by Morgan E	Comments Move	
Portfolio Analysis (test).xlsx		3/22/201 F by Morgan Stan	Delete	
Identification		3/22/2019 by Morgan Stanle	Version History	

## C DOWNLOAD FILE

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

## 

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

### **I** 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**.

## **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.

## 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.

The Morgan Stanley Digital Vault ("Digital Vault") is accessible to clients with dedicated Financial Advisors or Private Wealth 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 a member of your Morgan Stanley Team 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.

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