Morgan Stanley

Protect Your Files with Digital Vault

Now you can manage your wills, deeds, estate plans, financial statements and tax filings in one location.

Through Digital Vault, you can move beyond using filing cabinets, your email inbox and a folder on your computer to save and share documents with your Morgan Stanley team. With a few clicks, you can collaborate on and upload documents from your phone, laptop or desktop. Not only will this save you time, but it will also reduce the amount of sensitive paper you're holding onto and may even decrease your risk of fraud.



Seamless Collaboration

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



Device Flexibility

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



Enhanced Security

All documents uploaded are encrypted while in transit and when stored.

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How it Works

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.

You and your Financial Advisor team will be notified when new files are uploaded.

B CREATE FOLDER

Click on Create Folder. Name the folder, then click on **Save**.

WELCOME TO DIGITAL VAULT

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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.

C DOWNLOAD FILE

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

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



Click on the overflow menu 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 overflow menu 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.

Security Features:

We understand that uploading these sensitive items may give you pause. Safeguarding the personal information you entrust to us is our highest priority. Rest assured that we take precautions to help ensure the safety of your confidential information.

Access is logged and

are added.



Your documents are protected by strong encryption while in transit and when stored.

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Access to the documents is limited to you and your Morgan Stanley team and is protected by strong authentication technology.

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Documents stored in Digital Vault are backed up every night to multiple, geographically

monitored, and you will receive

a notification when new items



When documents are uploaded to Digital Vault, they are scanned for known viruses and malware.

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Powered by Box, which is compliant with various certifications including Payment Card Industry, Digital Vault's platform meets strict security standards for cloud based solutions.

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.

dispersed data centers.

The Morgan Stanley Digital Vault ("Digital Vault") is accessible to U.S. clients with dedicated Financial Advisers. 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.

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