

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.



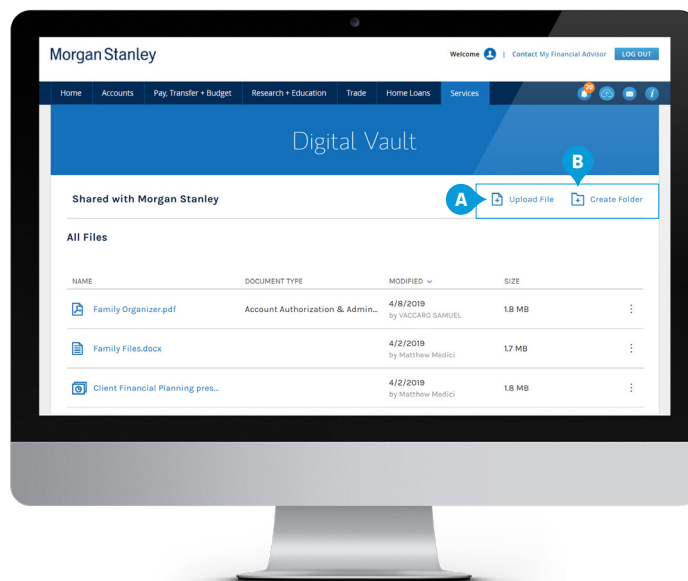
## Device Flexibility

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.



## 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**.

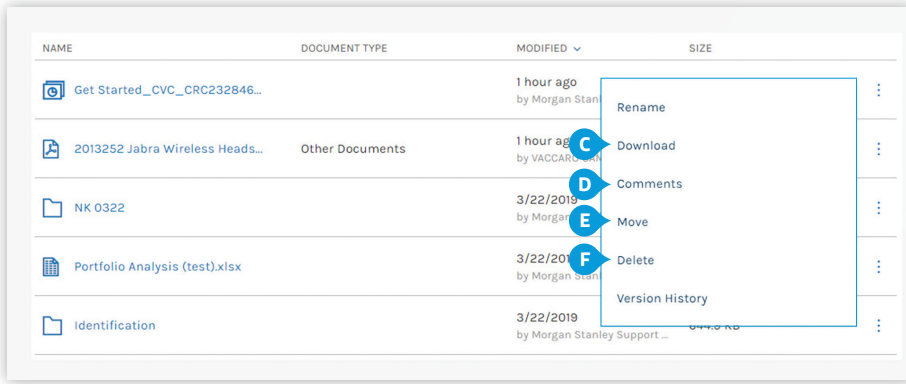
Your file will be reviewed by your Financial Advisor team.

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**.



**C DOWNLOAD FILE**

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

**D COMMENTS**

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

**E MOVE FILE OR FOLDER**

Click on the overflow menu 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 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.

**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.

**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.



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



Access is logged and monitored, and you will receive a notification when new items are added.



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



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



Documents stored in Digital Vault are backed up every night to multiple, geographically dispersed data centers.



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.

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