

# Morgan Stanley

# Welcome to Digital Vault

Digital Vault lets you easily and conveniently manage and share life's most important documents, such as financial statements, authorizations, tax filings, and other relevant files.



### Easy Document Sharing

You and your Morgan Stanley Team can now share documents with each other, and it's as easy as uploading a file.



### Convenient Access

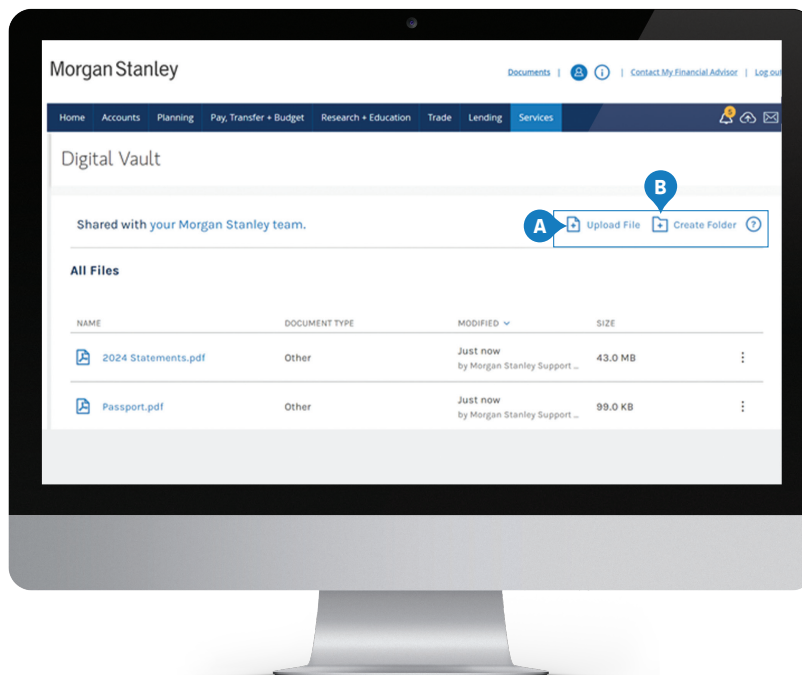
Files can be accessed across your devices, whether you use a PC, Mac®, iPad®, iPhone® or Android.™\*



### 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.

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 Morgan Stanley Team.

### B CREATE FOLDER

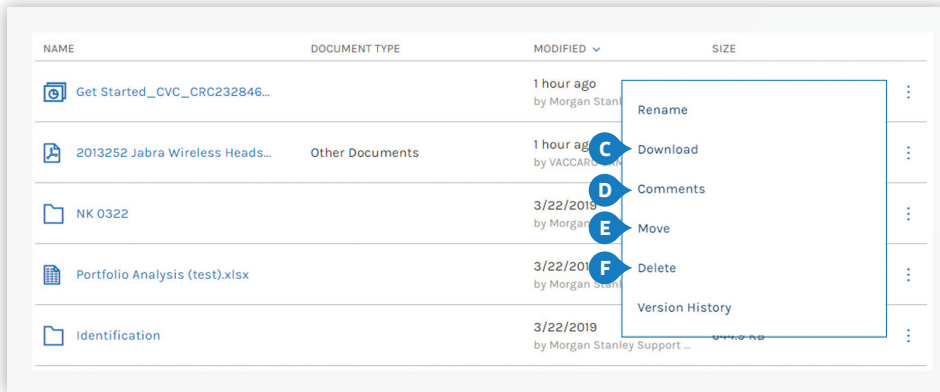
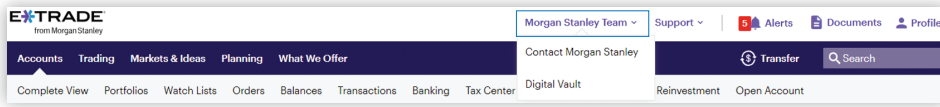
Click on Create Folder.

Name the folder.

Click on **Save**.

\*Note: The Morgan Stanley Mobile (MSM) app is currently unavailable to Prospects

## Eligible E\*TRADE users can access Digital Vault by clicking on the “Morgan Stanley Team” tab → Digital Vault



### **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.

### Additional Features and Tips

Your Morgan Stanley Team will be notified when you upload new files.

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

You will be notified when your Morgan Stanley Team uploads new files.

The Morgan Stanley Digital Vault (“Digital Vault”) is a service which allows eligible users to digitally share documents with Morgan Stanley Financial Advisors or Private Wealth Advisors. Documents shared via the Digital Vault should be limited to those relevant to your Morgan Stanley 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 accounts 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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