The Vault

At a moments notice, can you or your family members locate your most important files such as tax returns, wills, passports and birth certificates? With the Vault, you can. The Vault is a secure digital document storage repository. Using the Vault, you and your advisor can exchange confidential documents, collaborate on financial plans, and share personal data easily and securely.

SAFE & SECURE

Your Personal Financial Website employs advanced security features and protocols to keep your data safe, private, and secure at every hour of every day, year round. Our comprehensive security measures include password protection, Secure Socket Layer encryption, firewalls, intrusion detection, audits, inspections, and more.

PEACE OF MIND

With one, centralized and organized location to store all of your important financial documents and files, you and your family will always know where important documents are in times of need.

ACCESS ANYWHERE, ANYTIME

The Vault is accessible from any device so you can review, upload or retrieve your documents from wherever you are.

FILE SHARING OVERSIGHT

Upload files into the Shared Documents folder to make them accessible to your advisor or keep files private and visible to only you by adding them to the My Documents folder.