

MCKINLEY | CARTER

WEALTH SERVICES

Client Vault - Frequently Asked Questions

- 1. Is the Client Vault a safe and secure tool to use?** Client Vault uses a password protected log in system with 256-bit encryption. This is a very secure way to view your documents. You and your advisory team are the only people who will have access to the information in the system, unless you give access to others in the future at your own discretion.
- 2. If I do not use the Internet or do not have an e-mail address, how do I request previously mailed reports/documents?** Hard copy documents will be available upon request by contacting your advisor. You may also request these reports be made available during periodic meetings.
- 3. How do I log into the McKinley Carter Client Vault?** You will be sent an initial welcome e-mail from clientservices@mc-ws.com. This e-mail will supply you with your username, temporary password and instructions on how to access the vault. Once you log in with your temporary password, you will be prompted to create a permanent password. Please keep your username and password in a safe place for future reference.
- 4. What if I am not able to log into the Client Vault within 24 hours of receiving the welcome e-mail?** Please contact your local office or e-mail clientservices@mc-ws.com to reset your information. We will provide you with a new temporary password. Your username will remain the same.
- 5. What if I do not receive the welcome e-mail or other e-mail correspondence from the Client Vault system?** Please check your e-mail spam filter to make sure the e-mail did not get caught in it. To prevent client vault e-mail from being stopped by your spam filter, please add clientservices@mc-ws.com to your approved e-mail address list. Also, be sure to confirm the email address we have on file for you is accurate.
- 6. How do I locate documents McKinley Carter has placed in my Client Vault?** Initial documents will be uploaded to the **Investments** folder in the vault system. Investment documents can be located by following the path listed below:

Home > Vault Folder > (advisor name) > (client name) > Investments > Portfolio
- 7. What documents will I see in my Investments folder?** You may see investment performance reports or other related documents. Please note most documents in your vault will be PDF documents. Therefore, in order to view these documents you may need to download a free version of Adobe Reader at <http://get.adobe.com/reader/>.

- 8. How will I know when documents have been added to my Client Vault?** The Client Vault system will automatically send you an e-mail each time a new document has been uploaded to your personal vault.
- 9. Who can upload documents to my Client Vault?** Initially, McKinley Carter will upload documents to your Client Vault. In the future, we will communicate how you can upload documents and also allow other professionals (such as your accountant or attorney) to use the vault for collaborative purposes to help meet your needs.
- 10. What else can the Client Vault provide me by way of information?** The Client Vault allows McKinley Carter to upload instructions, forms, and other information which may be helpful for all clients to view or download. This information can be found under the **Shared Documents folder** on the Client Vault website. (For example, this FAQ will be added to the shared documents folder for all clients to refer to).
- 11. Are there space limitations for my Client Vault?** Yes. There are space limitations as far as how much information can be stored in your Client Vault. Individual vaults are monitored by the system to ensure storage space has not exceeded maximum capacity.
- 12. How long will my reports be accessible on the Client Vault?** Generally, documents are kept in your vault for 12 months. After 12 months, McKinley Carter may remove information from your vault. All information uploaded to the vault by McKinley Carter is also maintained and saved on our firm network for future reference.
- 13. Can documents in the Client Vault be deleted?** Yes. You are able to set pre-determined deletion dates for information you upload to your vault. Please make sure you have downloaded and saved information before deleting from your vault.
- 14. Where can I find more information about the use of Client Vault?** For more information, click on the HELP section of your Client Vault. You may also contact your local office for further assistance. We would be glad to set up a time to walk you through the system either over the phone or in person.