

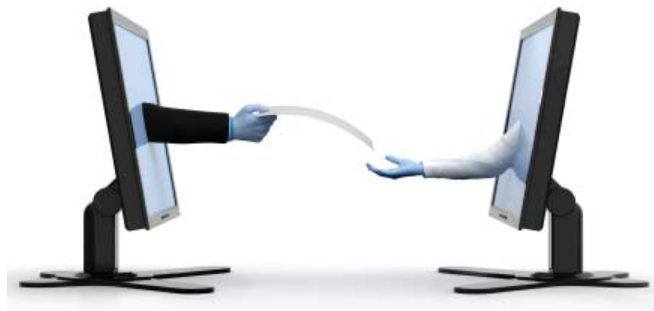
# Secure Document Server for Axys and APX



## Secure, branded statement delivery that's Earth-friendly

### Genesis

Like many of our solutions at InfoSystems Integrated (ISI), we created Secure Document Server (SDS) at the request of an Axys client utilizing our reporting suite to generate PDF packages of their client statements. The requirements of the project were to create a simple, but secure, branded portal for their clients to access PDF report packages and other documents that were uploaded to a data vault.



### Security is mission-critical.

When we developed the SDS application in 2006, we made security the top priority. In order to protect data, we implement multiple layers of protection. The most fundamental is the use of a digital certificate that authenticates the identity of the web site portal to visiting browsers and encrypts information via Secure Sockets Layer (SSL). Strict security standards, such as password standards enforced when clients reset their passwords, are implemented and maintained throughout SDS.

### Maintain brand identity.

Our client portal is customized to match the look and feel of each customer's website. The goal is to maintain overall design and continuity as website users go from the website to the portal and back. Avoid solutions that send clients to an unfamiliar website to access their private information.

### Keep it simple.

SDS is elegant in its simplicity. Clients and administrators can easily view statements and navigate the web portal. Once users have logged into SDS, they can view statements in a single consolidated PDF package or drill down on individual accounts and reports as illustrated below:

#### Investment Reports

##### ▣ Sample Family Combined Portfolios

- [Entire Report](#)
- [Letter and Benchmarks](#)

##### ▣ Tom Sample (IRA Rollover)

##### ▣ Tom Sample Custodian for Robert Sample

##### ▣ Tom Sample Custodian for Timothy Sample

##### ▣ Mary Sample (IRA Rollover)

### Let clients know you're green. It's a good thing.



Give clients an option to get their statements electronically, and underscore your firm's commitment to reducing its carbon footprint while saving money.

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