



## POWERPORTAL

PowerPortal is a powerful ASP.net and SQL Server technology that provides secure web portals for sharing, exchanging and storing information for viewing, printing, and downloading. PowerPortal is a great tool that provides better control over the flow of data and files between you and your clients, with the assurance that sensitive materials made available are always received, stored securely, and accessible only to those with express permission.

- ◆ Seamlessly integrate with **PowerAdvisor** for automated batch report processing and uploads.
- ◆ View, print, and download information from anywhere with an internet connection through a simple web-browser interface.
- ◆ Upload, store, and exchange information in most electronic formats including MS Word, MS Excel, Adobe PDF, text files, database backups (i.e. Quickbooks, Quicken, etc), scanned documents, and more.
- ◆ World-class data centers with superior 256-bit SSL encryption protection, automatic data backups, and guaranteed 99.9% uptime.



### Upload, Store & Exchange Important Documents such as:

- Investment Reports
- Brokerage Account Statements
- Fee Agreements & Firm Engagements
- ADV Part II
- Privacy Policies
- Investment Policy Statements
- Client Account Forms, Documents & Communications
- Research & Analytics Reports
- Newsletters
- Financial Plans & Estate Plans
- Wills & Trusts
- Powers of Attorney



PowerPortal  
Safe, Secure & Reliable





# POWERPORTAL

## Features

PowerPortal is an easy way to share critical information with affordable, anywhere access to important documents and data files.

### Access & Convenience

PowerPortal provides an accessible, convenient method to distribute and share information with clients.

- ◆ Provide secure, anytime, anywhere access - 24/7
- ◆ View, print, and download documents or data files from anywhere with an internet connection.
- ◆ Clients access portals by linking directly through your firm's website or via our system.
- ◆ Automatically generate email notifications whenever a new document or file is placed into a portal.

### Benefits

- ✓ **Getting started is fast and easy.**
- ✓ **Uploading information is simple and quick.**
- ✓ **Clients will enjoy the convenience of a web-based system.**

### Document Exchange, Sharing, & Storage

PowerPortal provides an efficient way to share and exchange private documents and data files safely, securely, and reliably.

- ◆ Unlimited file storage space and document exchanges.
- ◆ Upload and store information in most electronic formats including Word, Excel, PDF, text files, database backups, and scanned documents.
- ◆ Instant access to data once new files are transferred.
- ◆ Generate automated email alerts whenever items are placed into portals.
- ◆ Store information indefinitely or until you remove it.

### Benefits

- ✓ **Better control the flow of information between clients and you.**
- ✓ **Information provided is always received into a securely protected location.**
- ✓ **Store data indefinitely without the worry of losing historic documents and data files.**
- ✓ **Efficient and neatly organized distribution system for delivering and receiving client information.**

### Firm Branding & Customizable Options

Create a custom-branded portal system for exchanging business files with clients.

- ◆ Incorporate logo, colors, and other design elements.
- ◆ Add optional features such as images, photos, newsletters, stock quotes, calculators, and more.

### Benefits

- ✓ **Reflect consistency between firm branding, website, and portals.**

### PowerAdvisor Integration & Multiple File Upload

- ◆ Seamless integration with PowerAdvisor batch reporting for uploading multiple reports into portals.
- ◆ Automatic placement of reports into portals according to predetermined client mappings.

### Practice Efficiency, Productivity & Growth

Streamline service offerings to increase efficiency and reduce costs related to processing and storing hard-copy information.

- ◆ Replace paper-based communications with soft copies.
- ◆ Reduce storage space requirements associated with warehousing hard copy documents.
- ◆ Save time with instant distribution and document exchange capabilities.

### Benefits

- ✓ **Reduce expenses by using less paper, ink, mailing materials, postage, and staff time needed to produce and distribute hard-copy mailings.**
- ✓ **Receive fewer calls from clients requesting copies.**
- ✓ **Attract new clients with a wider variety of services.**

### Reliability, Security & Control

PowerPortal uses the security of data encryption and password protection to provide an advanced level of service for secure data exchange via the internet with:

- ◆ Superior 256-bit SSL encryption for secure connectivity.
- ◆ 99.9% guaranteed uptime.
- ◆ World-class data centers with automatic daily backups.

### Benefits

- ✓ **Reduce emails with client-sensitive information.**
- ✓ **Data provided always reaches the intended recipient.**



## Understanding Secure Socket Layer (SSL) Certification

### What is an SSL Certificate?

An SSL certificate is a digital certificate that authenticates the identity of a web site to visiting browsers, and encrypts information for the server via Secure Sockets Layer (SSL) technology. A certificate serves as an electronic “passport” that establishes an online entity’s credentials for their website and stored data. When there is an attempt to send confidential information to a web server, the user’s browser will access the server’s digital certificate to establish a secure connection.

Installing an SSL certificate on a web site secures online information with up to 256-bit encryption. The SSL certificate builds an impenetrable fortress around sensitive client information, which is kept securely encrypted and safe from prying eyes. Rigorous authentication methodology also guarantees that SSL certificates are issued only to entities whose existence and domains can be verified.

### Ensuring Data Safety & Security

An SSL certificate insures that data stored on the internet is both safe and secure. Once an internet user enters a secure area (by entering an e-mail address or other personal data for example), the site’s SSL certificate enables the browser and web server to build a secure, encrypted connection. If a user attempts to submit information to an unsecured web site, the browser’s built-in security mechanism triggers a warning that the site is not secured and sensitive data may be at risk.

The industry standard encryption is 128-bit (used by all banking infrastructures to safeguard sensitive data) and high-grade 256-bit SSL encryption for secured online transactions. The actual encryption strength on a secure connection using a digital certificate is determined by the level of encryption supported by the user’s browser and the server that the web site resides on. Encryption strength is measured in key length — number of bits in the key. To decipher an SSL communication, a decoding key must be generated. For example, 40-bit encryption involves 240 possible values. 128- and 256-bit keys involve 2128 and 2256 possible combinations, respectively, rendering the encrypted data de facto impervious to intrusion. Even with a brute-force attack, decoding a 128- or 256-bit encryption is computationally unfeasible.

### Rigorous & Stringent Authentication Methodology

Before SSL certification is issued, the applicant’s company or personal information undergoes a rigorous authentication

procedure that verifies the domain control. SSL certificates are only issued to entities whose domain control, business credentials, and contact information have been verified. Issuance of an SSL certificate guarantees that the entity which owns the certificate is who it claims to be and has a legal right to use the domain from which it operates.

### SSL Establishes a Secure Connection

An SSL-encrypted connection is established via the SSL “handshake” process. In essence, the visitor’s browser requests a secure session from the web server when accessing an SSL secured web site. The server responds by sending the visitor’s browser its server certificate. The browser verifies that the server’s certificate is valid and being used by the web site for which it has been issued, and has been issued by a Certificate Authority that the browser trusts. If the certificate is validated, the browser generates a one-time “session” key and encrypts it with the server’s public key. The visitor’s browser sends the encrypted session key to the server so that both server and browser have a copy. The server decrypts the session key using its private key. The SSL “handshake” process is completed, and a secure SSL connection is established.

### SSL Prevents Phishing & Pharming

SSL certification assists in thwarting phishing and pharming schemes that pose constant threats to sensitive online information that is under siege by cyber criminals.

Phishing schemes are attempts to steal and exploit sensitive personal information by tricking victims into accessing fraudulent sites that pose as legitimate entities, such as online banks and other businesses. SSL technology and its fraud-prevention measures detect schemes and deny certificate requests for suspicious domains. Pharming revolves around the concept of hijacking an Internet Service Provider’s (ISP) domain name server (DNS) entries. When a “pharmer” succeeds in such DNS “poisoning”, every computer using that ISP for Internet access is directed to the wrong site when the user types in a specific web address (URL). SSL technology also helps prevent pharming attacks because “pharmers” are unable to obtain an SSL certificate since they do not control the domain for which the certificate is requested. Internet users that attempt to access a site that is posing as the owner of the web site (and SSL Certificate) will be instantly alerted to a problem with the supposedly secure connection.

