

summaries



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Sigma Client Portal and Document Vault

Two years ago, Sigma introduced a new portal and document vault to clients. Our goal in this endeavor was to implement electronic services that would allow our clients to obtain readily available data and reports in a trusted and secure format. This portal does that and much more! It has given us the ability to communicate directly with clients through customizable reports, announcements and documentation in a format this is easy to use and secure in nature.

We would like to take the opportunity to introduce our client portal and document vault to clients who may not be utilizing this tool, and share some new features with those clients who are already familiar with it.

Client Portal and Document Vault Features

Dashboard: The portal features a customized dashboard homepage that allows you to see important account information in both numerical and graphical format. Because the dashboard is customizable, clients can determine what information they want see on their homepage and add/remove sections as they see fit.

Accounts Page: The accounts page gives clients an at-a-glance view of their accounts and their current values. This page displays both the current value of individual accounts as well as the collective value of all accounts managed by Sigma.

Reports: The reports page allows clients to run a standardized set of reports that are dynamically

accessible with the most current information. These powerful reports display account information in a way that is easy to understand and is visually appealing.

Document Vault: The document vault allows Sigma team members and clients to securely share important documents with each other. Documents are organized in various folders to allow them to be found and accessed quickly. We title these folders in “plain English” to take the guess work out of finding documents and eliminate confusion when searching for items.

iPad App: There is now an iPad application for the Advisor View Portal. This free app can be found in the App Store and will allow clients to access to all of the features listed above right from your iPad. Rest assured this app has all the necessary security features to protect your sensitive data.

Why is this important?

Last July, the subject of our Sigma Summaries was “Protecting Your Assets from Cyber Fraud.” Cyber fraud continues to be a prevalent issue in our daily lives and these crimes are becoming more and more sophisticated. Cyber criminals are very adept at impersonating and defrauding individuals. As a fiduciary to all of our clients, we encourage them to be aware of the various types of threats, and to take actionable steps to prevent potential security risks. We also do our part to protect the sensitive financial data that is entrusted to us by our clients.

Security measures of the client portal include:

Password protected entry - Any user attempting to gain access to the client portal must know the correct user name and password combination.

Secure passwords - Passwords must adhere to specific guidelines to ensure that they are secure in nature. All passwords must meet a minimum length size and include a specific combination of upper case, lower case, numeric and special characters.

Password changes are managed within the portal - A password cannot be changed in this manner unless the user can correctly enter the existing password first.

Password resets are managed electronically - A request to reset a password will prompt the system to electronically generate a temporary password which is automatically sent to the email address on record for the client.

Redacted account numbers - Although the client portal does provide a listing of client accounts and current balances, there are no account numbers listed on the portal. Individual accounts are identified only by account name and account type.

We recognize that many people are still leery of accessing financial information over the internet. However, we believe that in many ways, the information housed in the client portal is as secure as the information that you receive via the U.S. Mail every day. Think about how easy it is for someone to gain access to your mailbox.

We make every effort to ensure that the sensitive information in our client portal and document vault is always secure. The system uses 128-bit SSL encryption, the same protection that banks and financial institutions use, to ensure that your data is protected from unauthorized access.

At Sigma, we encourage our clients to utilize the client portal and document vault. It allows us to efficiently share information and reports and it utilizes the necessary security controls to protect your sensitive data.

We are excited about the client portal and document vault and all of the benefits that it can provide to clients. We would love the opportunity to give you a brief demonstration so that you can see for yourself all that the system has to offer. If you would like to schedule a demo, please contact your portfolio manager at 248.223.0122.

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