

Vickerman & Driscoll Financial Advisors, Inc.
New Encrypted Email Service for Client Security: Setup and Use

As of January 1st, we'll be using a more secure email platform provided by Smarsh email encryption and archiving service for emails that contain sensitive information including your address, social security number, account numbers, security holdings, custodian reports, tax documents, personal financial planning documents, estate documents, insurance information, and discussions of confidential matters. Protecting your vital information is our utmost priority, and we're taking these additional steps to ensure that you all remain safe from the increasingly prevalent and sophisticated cyber criminals. Emails that do not contain information that, if intercepted, would compromise your privacy or personal financial data will not be encrypted and will function as usual for your convenience. Some discretion must be used on our part on whether or not to encrypt certain emails, so our overriding rule is "When in doubt, encrypt."

The Smarsh portal is located at smarshencrypt.smarsh.com. Upon receiving your first email from this domain name, you will be prompted to set up a username and password through the Smarsh portal. This first email you receive will alert you that you've received a secure message from us and will appear as follows:



Dear ndrisc@gmail.com,

Kevin Driscoll has sent you a secure message using smarshEncrypt at 12/12/2016 1:15:00 PM (EST).

This message has been delivered through the smarshEncrypt system.

To view the message you need to sign in to the secure smarshEncrypt website by either clicking the link below or pasting it into your browser. Signing in is fast, easy and free.

View Your Secure Message Here:

https://smarshencrypt.smarsh.com/prinsite/my/t_secureview_signup.aspx?p=2&a=0262&e=ndrisc@gmail.com

(Access Code: 0262)

Why did you get this notice? Kevin Driscoll sent you an email containing sensitive information that requires a higher level of security and encryption than regular email can provide.

Learn more about Smarsh Archiving and Compliance suite of products at www.smarsh.com.

Thank you for using the smarshEncrypt system.

Sincerely,

smarshEncrypt

After clicking on the provided link, you'll navigate to the page below where you can easily set up a username and password:

Create a New Account

1. Verify Email Address 2. Create Account 3. Finish

Please enter your information to create a new user account.
All fields are required.

Email Address:

Access Code:

Enter the Access Code you received via email.

I do not have an Access Code, please send me a new one.

First Name:

Last Name:

Username:

Password:

Password must be at least 8 characters long and contain at least one uppercase letter, one lowercase letter, one number, and one special character.

Verify Password:

[Create User Account](#)

[Back to Login Form](#)

Following this one time setup, you can simply sign in on the Smarsh login page using the username and password you designate. You will be notified on your usual email address of future encrypted messages that you receive from us and provided a link to the Smarsh login page.

The Smarsh secure platform functions as any other email would once you're logged in, with Inbox and Sent Items folders, as well as the ability to reply to the secure emails. You can also add and view attachments. The Inbox default setting is set to show only unread messages, but you can click 'All' on the view options and view all of your previously received encrypted emails if you wish. Once you're finished with a session, simply log out in the upper right hand corner as you would regularly.

The screenshot shows the Smarsh Secure Messages web interface. At the top, there's a navigation bar with "Secure Messages" and "Verify Email Address" tabs, along with "Help" and a user profile for "Nathan Driscoll". Below this is a blue header with "Secure Messages" and "My Account". The main content area includes a "Show: 15 per page" dropdown, "View: Unread Read All" radio buttons, and a "Filter by Email Address" dropdown set to "- all -". A "Verify New Email Address" link is also present. The email list table has columns for checkboxes, Status, Attachments, Date, Sender, Recipient(s), and Subject. One email is listed with a subject "communicating new email encryption policy safe". A sidebar on the left shows folders: "Inbox", "Sent Items", "Archived Items", and "Manage Folders". At the bottom, it says "Message 1 of 1 | Page 1 of 1" and "Click on a message to view the details here".

<input type="checkbox"/>	Status	Att	Date	Sender	Recipient(s)	Subject
<input type="checkbox"/>			12/12/2016 1:15 PM	kevin@vickerman-driscoll.com	ndrisc@gmail.com	communicating new email encryption policy safe

These are a few extra steps that will go a long way in helping us keep your identity and personal information as safe as possible while complying with requirements from the Securities and Exchange Commission (SEC), our primary regulator, and consumer data protection statutes. Thank you for your help and patience with this transition. Please get in contact with us if you have any questions.