EGNYTE

Secure Client Workflows
Powering the Future of Work

Egnyte for Financial Services is an all-in-one platform designed to deliver client-centric document experiences, enhance employee productivity, and simplify compliance action while enabling robust data security and real-time visibility everywhere your team works.

Key Benefits

Modern Work Experiences
Egnyte elevates your business processes with advanced features and tools that promote efficiency, collaboration, and end-to-end protection without limitation.

Omni-channel Connectivity
Egnyte seamlessly integrates your document workflows across multiple channels and solutions, ensuring smooth and secure client engagement and the ultimate personalized experience for your team.

Comprehensive Protection
Egnyte shields your sensitive data from potential threats (internal and external), ensuring the trusted use and privacy of the valuable data assets Financial Services firms run on.

Trusted by 1,000s of Financial Services Firms Worldwide

The Colony Group

ASPIRIANT

ep wealth advisors

NFP

Charlesbank

SOUTHSTAR BANK

Riverside

CREATIVE PLANNING

How It Works

1 **Secure Document Workflows: Elevate security and trust across client interactions.**
- Safely request, store, and share files with clients (Onboarding) or third parties (Services).
- Seamless document co-editing and approvals for instant teamwork across departments.
- Safeguard critical sell-side and buy-side transactions with modern, secure virtual data rooms.
- Benefit from constraints, warnings, and alerts that prevent unauthorized sharing of sensitive data.

2 **Unified Data Management: Unlimited access and banking-grade protection across devices.**
- Consolidate various solutions and simplify your IT infrastructure with a single, unified platform.
- Choose from cloud, private cloud, or on-premise deployment to manage content on your terms.
- Protect your sensitive data from breaches, ransomware attacks, and other external/internal threats with advanced encryption, access controls, and auditing capabilities

3 **AI-assisted Compliance Insights: Automated classification and insights to drive action.**
- Data classification and tagging of personal information across any repository.
- Pre-built, one-click compliance scans to classify data, flag risks, and stay up-to-date with regulations.
- Tailored audit reporting workflows to align with your unique compliance requirements.
- Enhanced defensibility through real-time monitoring, visibility of sensitive data, and record keeping.

The Power of Many Tools in One

Don't let outdated solutions, changing client expectations, and increasing regulations hold you back.
Embrace the future of secure document experiences and trusted data protection with Egnyte.

Intuitive User Experiences

Modern, hassle-free interactions benefiting clients and employees.

- Worry-free file uploads, sharing, and collaboration directly from clients to Egnyte.
- Embedded templates, document approval workflows, and e-signature.
- Enhanced productivity with co-editing directly from native M365, Google, and CRM tools.
- AI-assisted document summaries and chatbots to quickly resolve client requests.

Access Without Limits

Effortless and secure document access to keep business flowing 24/7.

- Web, mapped drive, and mobile access to allow work where users are most productive.
- Real-time synchronization and versioning to ensure seamless updates across workflows.
- Integrated with 100+ apps to centralize experiences and deliver a single source of truth.
- Built-in data recovery, file snapshots, and replication to protect your workflows from ransomware attacks and unplanned disruptions.

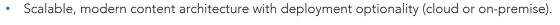## Proactive Compliance Insights

End-to-end visibility of documents and sensitive client data to eliminate data silos.

- Multi-cloud governance across M365, Google, Box, Windows File Servers, and more.
- 100s of pre-built compliance patterns to scan data, label PII, and flag risk across repositories.
- Automated, continuous monitoring of unstructured data to enforce defined policies.
- Real-time audit trails and breach reporting for next-level visibility and record keeping.

Simplified IT & Administration

Centralized document and file management reducing internal barriers for growth.

- Scalable, modern content architecture with deployment optionality (cloud or on-premise).
- Native encryption, multi-factor authentication, and granular rights to safeguard content.
- Centralized control center to manage security policies effectively across users and devices.
- Surveillance, flagging, and alerting to non-compliant activities (unauthorized access, suspicious activity, behavior-based anomalies, and more).
- Robust document life-cycle management and document retention to align with FINRA, OCC, FDIC, MiFID II, and SEC requirements.