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May 13, 2014

Aloha WealthBridge Ohana,

We have some very exciting news, and are glad to finally be able to share it with you! WealthBridge, Inc. has teamed up with ShareFile to provide you with a convenient & secure way to access all WealthBridge paperwork and forms.

### **Why Are We Doing This?**

We made this decision for 2 distinct reasons: **security & convenience** for our clients. With all the news stories of security breaches being exposed within the last year (Target, Neiman Marcus, the "Heartbleed" bug), we are revamping our own security measures to ensure your Private Information is not exposed to any unnecessary risk. The security of your Private Information is one of our top priorities, and we value your confidence & trust in us as your financial advisor. We also understand that many of you do not have immediate access to a printer and/or scanner, and that snail mail may require up to 1 week for a correspondence. ShareFile is a fantastic alternative that not only allows us to send you files with up to SSL/TLS 256-bit encryption, but will give you access to those files on your computer, tablet, or smartphone anywhere in the world!

### **What's So Great About ShareFile?**

We are thoroughly excited about ShareFile for a number of reason:

- **eSignature:** No more printing, signing, scanning, & returning applications/forms via email! Right Signature will allow you to legally sign documents with either your mouse (on a computer) or your finger (on a tablet or smartphone) from anywhere in the world.
- **Mobile Tools:** ShareFile offers apps for your Mac, Droid, BlackBerry, or Windows computer, tablet, or smartphone, allowing you to access and/or sign documents on the go!
- **Security:** No more sending applications with personal information via email! You will be able to access and/or sign your documents by logging into your ShareFile account (accessible from our WealthBridge website) - similar to TradePMR. You will also receive an email notification whenever a document is uploaded into your account with an access link as well.
- **Going Green:** ShareFile will allow us to dramatically reduce the physical papers that will need to be printed for applications. Not only will ShareFile speed up our processing time, but reduce our paper waste at the same time!
- **Training Guides:** We understand learning a new system is time consuming, difficult, and in general "humbug". Fortunately, ShareFile has great resources available to walk you through your accounts. Attached is the Basic Client Guide. More guides, videos, & articles can be accessed at: <http://www.sharefile.com/support/>. You also have access to free, unlimited support at [1-800-441-3453](tel:1-800-441-3453) and of course, our office.



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## What Do I Need To Do?

1. **Get an Email:** Everyone will need an email address to activate their ShareFile account. If you do not currently use email, we are strongly recommending you to think about starting one up. Also, if the email we have on file is not your preferred email, please update your Contact Information with us using the Google Form on our website (Client Resources tab). We will be using ShareFile as our default method of distributing documents unless you notify us in writing otherwise.
2. **Add Emails:** Most importantly, you will need to add the following email addresses to your email contacts: [noreply@sf-notifications.com](mailto:noreply@sf-notifications.com) & [mail@sf-notifications.com](mailto:mail@sf-notifications.com). Failing to do so will result in your ShareFile activation email and notifications to be sent to your Spam folder.
3. **Save Important Websites:** Please bookmark our website ([www.wealthbridgeinc.com](http://www.wealthbridgeinc.com)). You have access to the log-in pages for ShareFile, TradePMR, & Pensco from both the website's Welcome Page & Client Resources.
4. **Activate Your Account:** You will be receiving an activation email from ShareFile within the next couple weeks (we want to give everyone time to add ShareFile's emails to their contacts). Please keep an eye out for this activation email and follow the instructions to set up your account.
5. **Log In & Change Your Password:** You will be should be sent a temporary password with your activation. After your initial log-in, please change your password in the My Settings tab.

ShareFile will allow WealthBridge to provide you with more streamlined, secure, & eco-friendly service, and we are very excited! We hope you will join us as we institute this new policy. Below are some screenshot pictures explaining the above To-Do steps in detail. Thank you so much for the opportunity to serve you, and have a blessed rest of the week!



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## 2. Add ShareFile emails to your contacts:

**CHANG HOLDING COMPANY**

ShareFile has been added to "Companies". [Undo](#)

**Contacts**

**NEW CONTACT**

- My Contacts (316)
- Most Contacted (20)
- Other Contacts (161)
- Directory
- New Group...
- Import Contacts...

**ShareFile**

Job Title · Company

☆ My Contacts Companies

Work: noreply@sf-notifications.com

Work: mail@sf-notifications.com

Add email

Work: 800-441-3453

Work: +44 (0800) 680-0621

Work: +1-919-745-6111

Mobile Phone: [Redacted]

Work: 701 Corporate Center Drive Suite 300  
Raleigh, NC 27607

Add address

Add a note

## 3. Access ShareFile via WealthBridge, Inc. website:

**WEALTH BRIDGE**  
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Where Diligent Minds Build Wealth

Welcome | Our Company | Products & Services | Insurance | Client Resources | More...

Where Diligent Minds Build Wealth

Welcome to the WealthBridge Family! We are a Wealth Management Company committed to building financial and professional wealth and helping you achieve your financial goals. We look forward to a more prosperous future with you!

Let's Build Wealth Together!

ShareFile Login | TradePAC Account Login | Penco Account Login

Client Resources

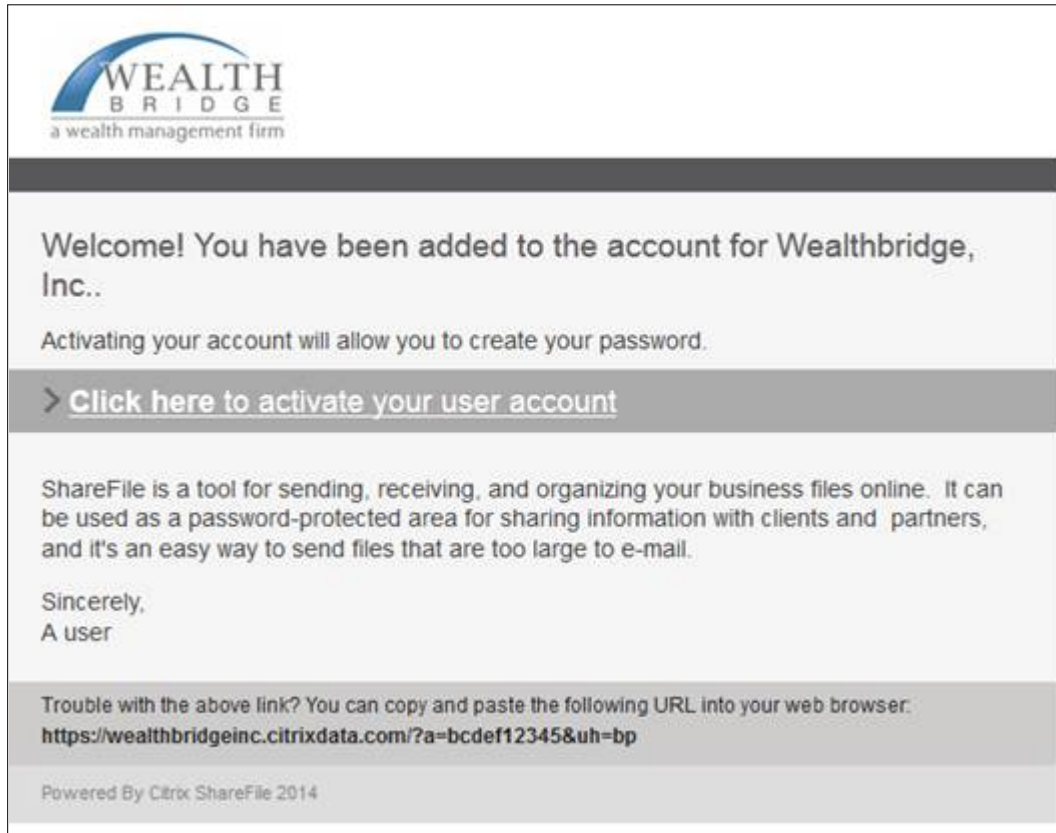
ShareFile Login | TradePAC Account Login | Penco Account Login

Four people standing together in a professional setting.



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#### 4. Keep an eye out for the ShareFile activation email:



#### 5. Log in and change your password:

