

Password Protected PDF vs Client Portal

Protecting your clients and their data



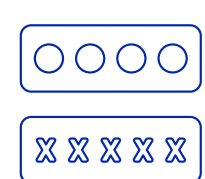
As a Financial Planner, you're required to transfer sensitive information every day. Considering the ever-increasing security risks associated with internet communication it's more important than ever for advisers to find secure means of file transfer that help them protect their business and clients' information.

Most people believe that PDF password protection helps to keep their data secure and safe. However, this isn't true. Although passwords have been the most common form of security by which users secure a PDF file, it has also been the most vulnerable.

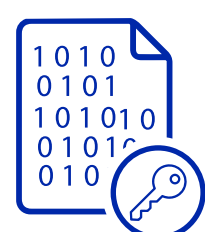
The GOOD



It is a cost-effective method, and you can do it yourself. There are a ton of programs out there to help you.



Username and Password are the most common form of access mechanism in use on the planet, so there is high user acceptability.



With most PDF encryption software you can encrypt a PDF using high levels of security.



It's easy to view on almost every platform.

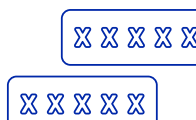
The BAD



Strong passwords are difficult to set up and use – clients cannot relate to them, there are too many passwords to try to remember, and password managers that offer to keep them safe for you provide a single point of failure should anything go wrong.



You can access it and send it to the client instantly.



The stronger a password gets, the more likely a client will write them down on their computer and copy and paste it in. It's not always the most satisfactory security approach.

The UGLY



Password generators and password attack programs have been around for a long time as free web downloads and are very effective.



There are lists of popular passwords, showing that manual password selection is seriously flawed.

So what is my alternative? Client Portal.

Advice Revolution can provide your clients with a secure client portal, reduce the cost of advice and speed up your delivery with a great client experience.



One of the key advantages of a client portal has always been the ability to share information with clients in a secure format.



Documents can be shared, signed, and submitted within the portal without the inconvenience of using paper or the insecurity of using password-protected PDFs via email.

A great client portal can benefit your advice business by giving clients a central point of information, improving client engagement, improving transparency and aiding compliance, improving security, and providing on-the-go access for clients via mobile devices.

