



# Sarah Quirk

WEALTH ASSOCIATES

---

THE DOCUMENT PORTAL

# Contents

1. The Modern World Is Extraordinary
2. What is The Document Portal?
3. Introduction
4. Key Benefits
5. Getting Started
6. Mobile App
7. Security
8. Preserve Your Legacy
9. Support
10. Privacy Policy
11. Press
12. Contact Us

# The Modern World Is Extraordinary

We can take videos with our phones, talk to friends through our laptops, send documents thousands of miles in seconds. But could you quickly find your house deeds, a tax return from five years ago or the insurance valuation for your jewellery?

Our home filing systems are woefully behind the times. Papers stuffed in boxes, documents in the loft, important letters on top of the wardrobe...

Imagine having all your paperwork securely in one place.

Imagine an 'online filing cabinet' where every paper was in order, deadlock secure, easily searchable, and accessible at the touch of a button...

Welcome to **The Document Portal**.

# What is The Document Portal?

We use the portal to ensure important information reaches you as quickly and securely as possible.

It allows you to safely store your valuable documents and memorabilia, alongside the information shared by us.

Protected by ultra-secure, state-of-the-art technology, all your documents are available to you, wherever you are.



*"We can lay our hands on our policies, deeds and certificates at a moment's notice, thanks to the Portal. It's a lot more secure than our study at home."*

# Key Benefits



## SECURE COLLABORATION

A secure 2-way portal enables us to instantly share documents with you and vice-versa



## MOBILE APP

All documents are word searchable, allowing you to find what you are looking for instantly



## INTERGENERATIONAL PLANNING

Get your affairs in order and keep priceless documents and memorabilia safe for future generations



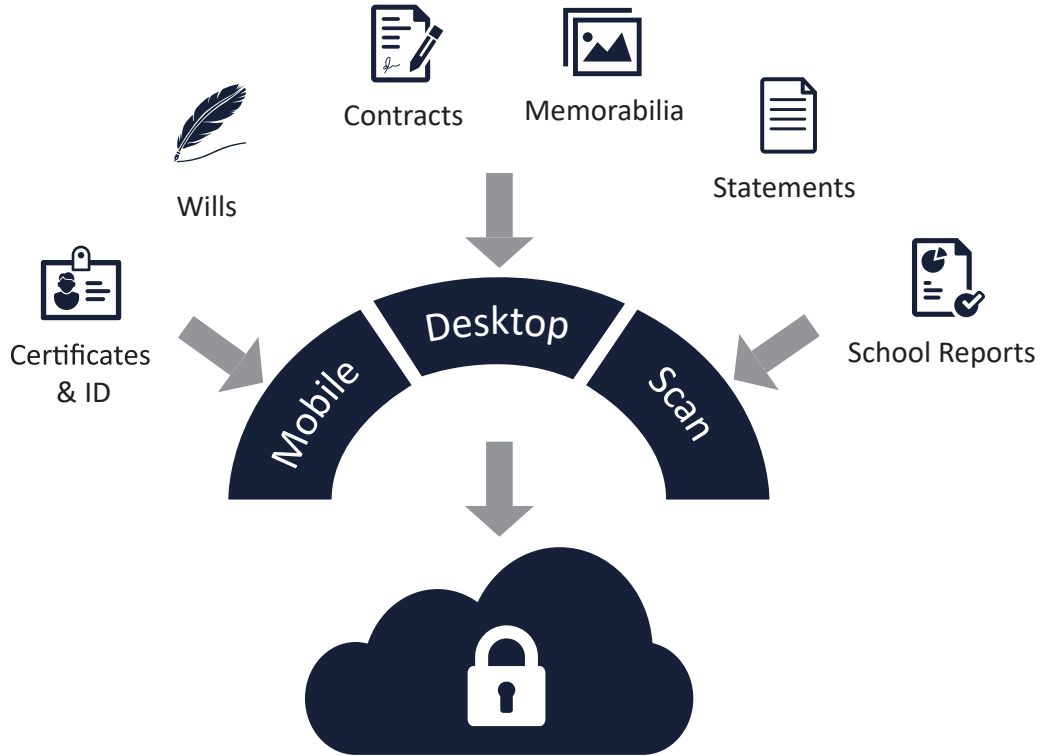
## PROTECT

Avoid the risk of losing important documents or treasured memorabilia in a fire, burglary or flood



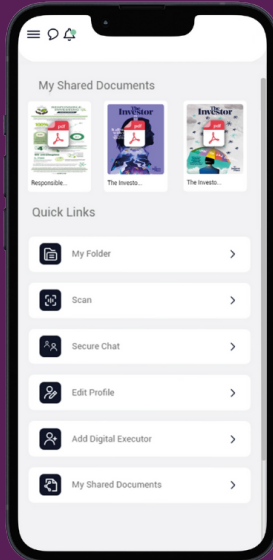
## SECURITY

The Portal has the highest levels of security and your data is hosted and backed up in ISO27001 accredited data centres in the UK

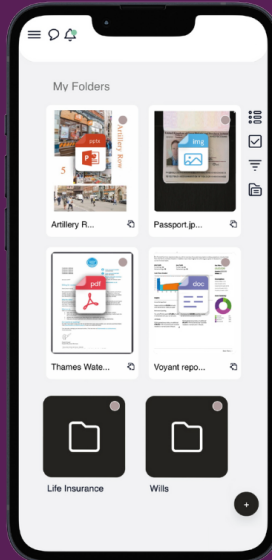


# Mobile App

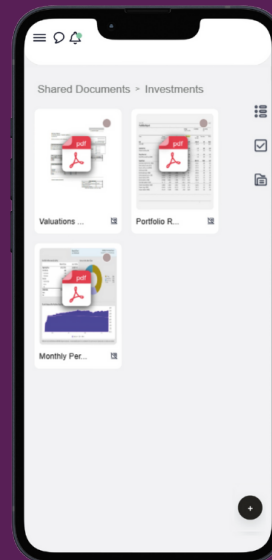
QUICK ACCESS  
DASHBOARD



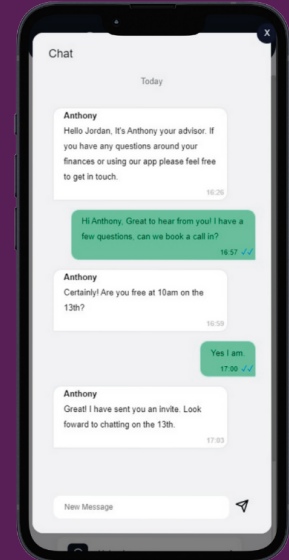
CREATE AND ORGANISE  
FOLDERS



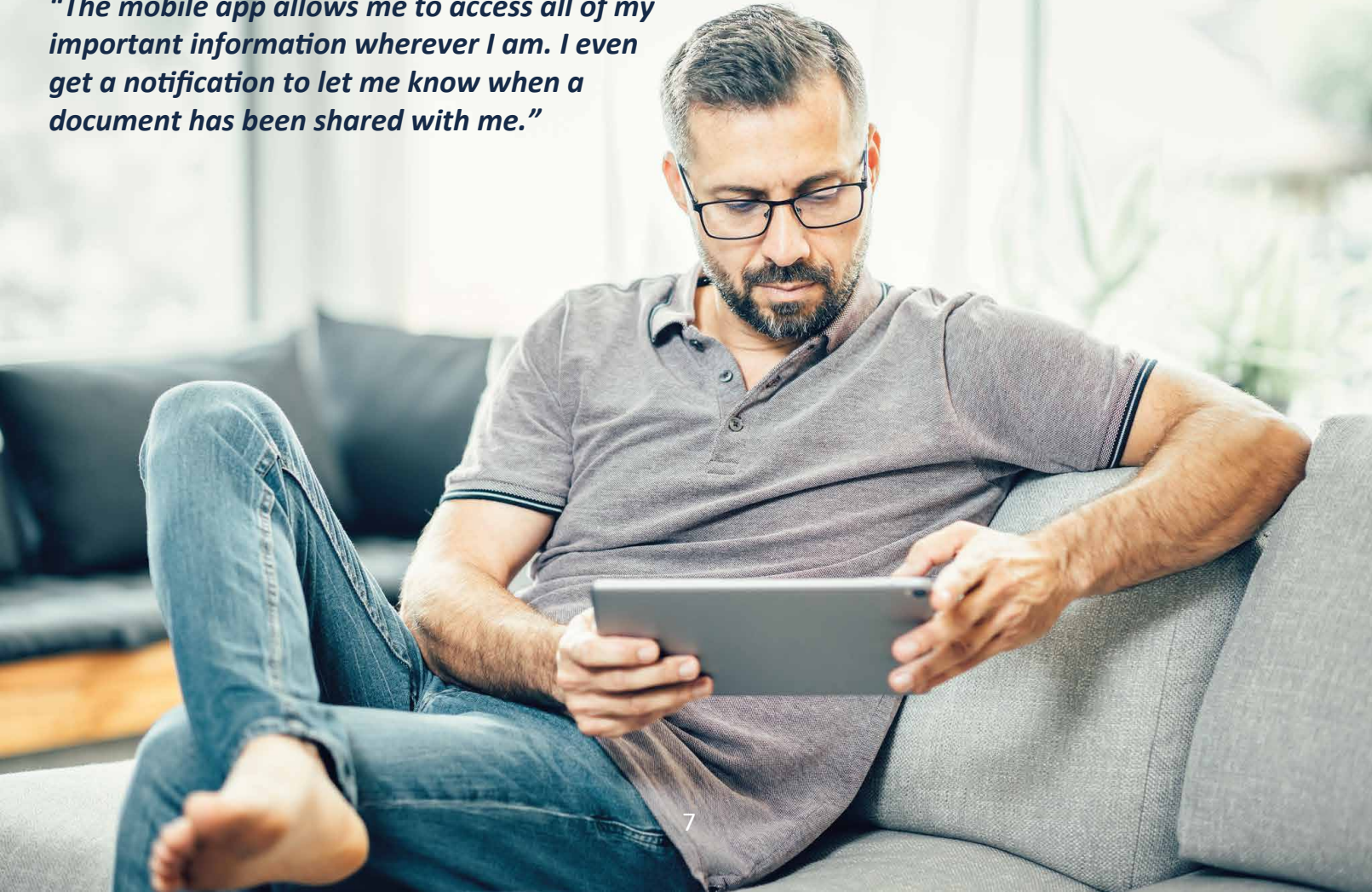
INSTANT ACCESS TO  
SHARED DOCUMENTS



SECURE CHAT



***“The mobile app allows me to access all of my important information wherever I am. I even get a notification to let me know when a document has been shared with me.”***



# Preserve Your Legacy

The death of a family member or friend is always a sad and difficult time. But it can be even more distressing if their personal affairs are badly organised. Tracking down bank accounts, life policies or legal papers is a lengthy and costly business.



In the UK some £50bn in assets remains unclaimed



Sorting out an estate typically takes 9 months to complete

By having all your documents and memorabilia in one secure place and nominating Digital Executors you can preserve your legacy for generations to come.

***“You can’t imagine just how much peace of mind the Portal has given us. The family will have no problems with our estate now, which might well be our best legacy to them.”***



***“Not only are our important documents safe and accessible at anytime, we have gained a room back in the home.”***



# Press

“You really can have your documentary life stashed away on there.”

HOW TO  
how to  
spend it

“Your teetering paper skyscrapers are replaced with a slick online filing system.”

**Daily**  **Mail**

“There’s even a section where you can put your will, expression of wishes or kind remarks to be read beyond the grave.”

**SPEAR'S**

“They scan all your documents and organise them in a beautiful fashion.”

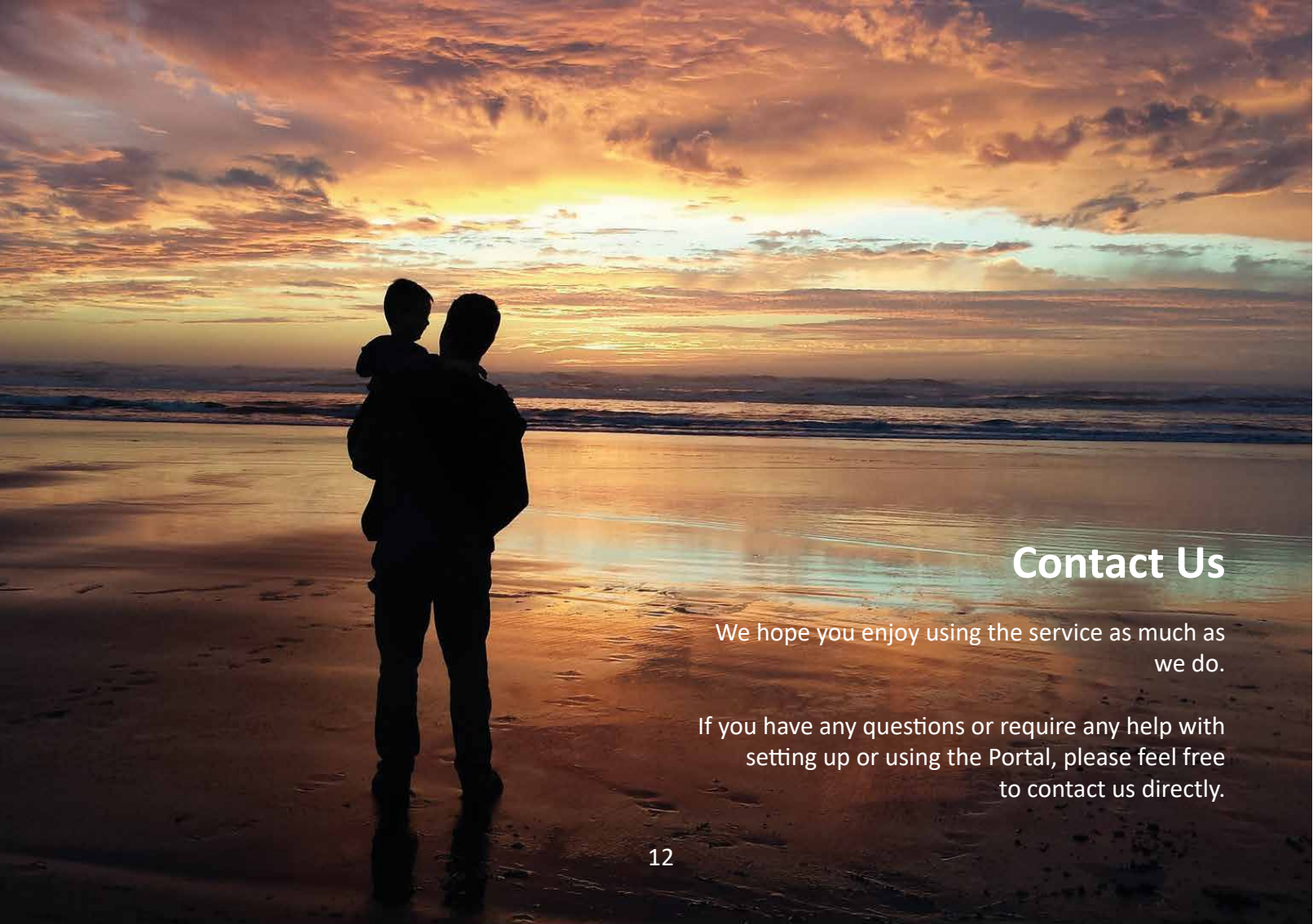
**TATLER**

“If you keep your most important documents in an old box, this service could be for you...”

THE  
**SPECTATOR**

“Every piece of paper that’s worth keeping in the house is worth filing in your Portal, accessible at any time you wish to be nostalgic.”

**the market**



## Contact Us

We hope you enjoy using the service as much as we do.

If you have any questions or require any help with setting up or using the Portal, please feel free to contact us directly.

Pension  
Guarantees Licences Share Certificates  
Passports Insurance Policies  
Warranties Will HMRC Papers  
Leases Trust Documents Powers of Attorney  
Birth Certificates Exam Certificates NI Numbers  
Mortgage Documents School Reports  
Planning Permission Investments  
Marriage Certificates Degree Certificates  
Title Deeds Executor MOT Certificates  
Medical Records Surveyors' Reports  
Service Contracts  
Log Book Loan Agreement