

Sample Template: Investor

Dear [\[Client's Name\]](#),

Everything you own and everything you owe, such as mortgage, credit card statements, or student loans, all in one place. That's the idea behind the **Vault**, a one-stop-shop for all of your important files accessible right from your Personal Financial Website.

Whether you're looking for the deed to your home, medical records, or family photos, the Vault can securely hold digital copies of your most important documents for easy access.

Check out our [Vault Checklist](#) for a list of documents you should consider storing in your Vault to give you peace of mind today. And if you're worried about security, see our [Safe and Secure PDF](#) with more information on the Vault's security features.

[eMoney note: The URLs for these resources can be accessed from your *Help* menu, in the section: *Client-Facing*]

Start saving your valuable documents and precious memories to the Vault today.

[\[Site URL\]](#)

Sincerely,

[\[Financial Professional's Name\]](#)