

# Solutions for Financial Services



## Enable Secure File Sharing and Mobile Productivity

Traditional processes of sharing information via email attachments, printed files and consumer file sharing tools are resource-intensive and time-consuming. With industry regulators on their heels, financial services and insurance companies need to look for superior ways to deliver timely customer service and protect information as new tools and technologies enter the market.

### The Solution

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BlackBerry® Workspaces secures your enterprise content wherever it travels. With Workspaces, all stakeholders can safely access, share and collaborate on even the most sensitive files, using any mobile (iOS®, Android™, BlackBerry®) or desktop (Windows®, Mac®) device.

Combining an easy, intuitive user experience with a unique data-centric architecture (which embeds protection right in your files), BlackBerry Workspaces is designed to meet the needs of your organization, IT team and users.

#### Security, Visibility and Control

Workspaces is the most secure enterprise solution on the market, perfectly suiting regulations such as GLBA and FINRA. With full end-to-end document protection and tracking, Workspaces imparts the industry's highest level of security while maintaining ease of use. Sensitive documents are encrypted with strong AES-256 at all times (at rest, in transit and in use) and remain controlled even after they have been accessed on mobile devices or shared with external parties.

#### Integrated Collaboration

Workspaces enables users to edit, annotate and collaborate on files in one seamless, secure application. When content leaves the system, the security restrictions travel with it, because content-modifying functionality is built into the system, so you retain full visibility and control.

#### Easy-to-Use DRM Controls

Workspaces provides optional, integrated digital rights management (DRM) technology that can allow file owners and administrators to remain in full control even after content is downloaded or leaves the shared workspace.

#### Enabling Information Sharing in Finance

- Industry compliance: GLBA, FINRA, PCI
- Virtual deal rooms
- Contract negotiations
- Client services: Protection of PII
- Executive communications

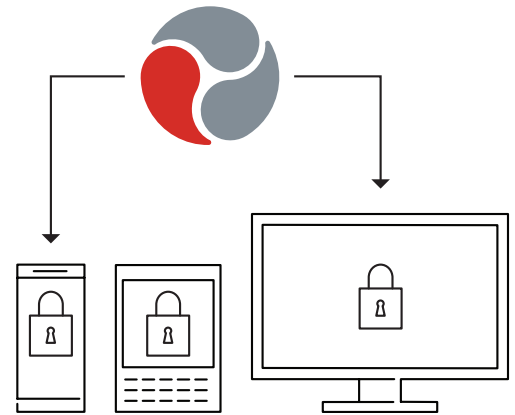
#### Workspaces Document Controls

- Permission to download (or restrict to online view)
- Permission to print
- Permission to edit, copy
- Permission to forward
- Screen capture protection
- Dynamic watermarking
- Access expiration
- On demand remote management of file access controls

**Key Use Cases in Financial Services**

**Wealth Management Advisors**

For wealth management advisors, catering to the client is the first priority. This includes providing tools to make it easy to do business with you, and keeping their interests in mind to preserve trust and loyalty. Clients are entrusting you to manage their personal identifiable information (PII), including documentation of their valuable assets and financial records. Workspaces can help you remain accountable, tracking who is accessing this information and how it is being used. Automatically sustain your business reputation with the provable guarantee that the information will not be shared with unauthorized third parties for solicitation or exploitation, or risk violation of industry and state-regulated personal privacy laws.



**Research Collaboration**

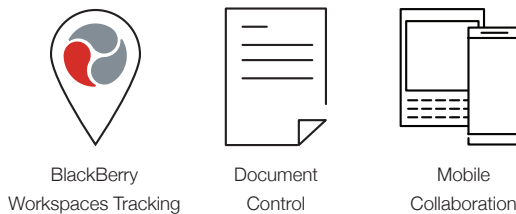
Senior research analysts are road warriors — constantly traveling to clients and meetings. They often need to review documentation with colleagues while in transit. Workspaces can facilitate the process by providing an integrated suite of collaboration tools (sharing, editing and annotations) and full document tracking to allow analysts to maintain accountability. Workspaces thus eliminates the risk of sensitive intellectual property being exposed. If the information is leaked out before the appropriate time, it may affect your company's credibility and profitability. With Workspaces, research content will always be automatically encrypted and controlled so that you can rest assured that intellectual property is protected regardless of how researchers share files.

"Having the security of Workspaces allows me to confidently disseminate reports."

Sr. Executive, Financial Services Company

"We no longer have to request that our portfolio companies destroy/return IP because we can simply remove their access to it with the click of a button."

Vice President, Financial Services Company



**Gramm-Leach-Bliley Act (GLBA) Compliance**

In order for insurance companies to be GLBA-compliant, they need to prove, beyond a shadow of doubt, that sales and marketing information is approved by the compliance department. With the tracking and security associated with Workspaces, independently operated and geographically dispersed agents have a secure mechanism to coordinate information with the compliance department. Workspaces is the secure solution that enables users to have the functionality needed to complete their work more efficiently — with the usability they want and the security your organization demands.

**About Workspaces**



BlackBerry Workspaces makes your content secure wherever it travels. With Workspaces, all stakeholders can safely access, share and collaborate on even the most sensitive files, using any device — desktop (Windows, Mac) or mobile (iOS, Android, BlackBerry). By combining a user experience that's

as easy and intuitive as any consumer solution with a unique data-centric architecture (which embeds protection right in your files), BlackBerry Workspaces is designed to meet the needs of your organization, IT team, and users. To learn more, visit [www.blackberry.com/workspaces](http://www.blackberry.com/workspaces).