

BE THE FIRST

to cybersafe your client

Our world is becoming smaller every day and people demand things instantly. Clients want access to information and documentation anywhere anytime, whether in Cape Town, Johannesburg, London, Sydney or even Beijing. The fact is, sooner rather than later your clients will require you to work in such a way that they have access to their information via the Internet within a secure environment, whenever it is convenient to them.

This might sound like a major challenge and, on top of this, intermediaries' paperwork has increased dramatically due to legislation requirements.

You might have tried going paperless only to realise that a substantial amount of documentation required should be provided to the client by other service providers. A major challenge in giving accurate and timeous advice is the incomplete information provided by clients. The client's accountant has the financial statements of the business entities and his legal adviser has his will and trust documents; and if this is not enough, the client is not even sure what he has and doesn't have and whether it is the most recent.

So what is the ideal solution? It is to create a secure on-line safe for your client where you can upload all his documents. He would be able to access these documents and even upload further documents. The client would also be able to appoint other service providers to his safe, such as his accountant and legal adviser and manage their areas of responsibilities; and be able to control who sees what in order to ensure all service providers operate within their mandate.

So what are the benefits to you?

- Be the first to offer this to your client and add value,
- Increase retention percentages,
- You will have access to more information and more up-to-date information.
- Access to business and trust financial statements and valuations.
- See the big picture and provide accurate advice.
- Identify additional opportunities.
- Network with other providers and even get referrals.
- Reduce requests for copies of documents.
- More structured client filing within your company.

So how do you go about getting this up and running? The solution is to Cybersafe your client.

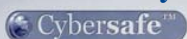
Cybersafe is a unique South African system custom designed for the interaction between intermediaries, accountants and legal advisers. The system also allows the client to protect certain information from all providers. The system has a whole host of functionalities built in and an easy-to-use structure for efficiency.

Visit www.cybersafe.co.za and allow your client to see the big picture instantly from anywhere in the world. If you don't, somebody else will offer this to your client.

Can you afford not to offer this to your client?

- You and your client will be able to store documents within a secure password protected system and access it from anywhere in the world.
- Documents include will and last testament, insurance, trust deed, financial statements, tax returns and other related documents.
- Documents are also uploaded by other service providers to the client such as accountant and legal advisor.

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How Cybersafe will help you:

- More complete client information available
- Identify opportunities
- Networking with other providers
- Paperless office and automatic backups
- Compliance made easy
- Client retention

www.cybersafe.co.za



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