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Steps to simplicity and peace of mind.



Step 1: Assess

Meet with your personal archivist for 15-30 minutes to assess your situation.



Step 2: Review

Receive your project proposal from Morgan Street including scope, pricing and timing based on assessment.



Step 3: Initiate

Sign the agreement to initiate your project.



Step 4: Participate

Participate in a 1-hour interview with your Personal Archivist to describe the information that is important in your life. This will be used to personalize your vault. No advanced preparation is required for this interview.



Step 5: Provide Access

Provide access to the paper and digital documents that you would like stored in the system. Your Personal Archivist will oversee the necessary processing to upload, organize, and securely store the documents in your vault.



Step 6: Test Drive

Take a test drive of your completed vault in a 15-30 minute session with your Personal Archivist.



Step 7: Relax

Relax, your documents are secure, organized and accessible. Maintain your Secure Vault yourself or utilize your Personal Archivist as required to upload new documents, add new users, and to efficiently handle your document management needs.



MORGAN STREET
DOCUMENT SYSTEMS