KITEWORKS USE CASES

Preserve Client Finances and Data Privacy

Financial services professionals must uphold client confidentiality, maintain stringent security protocols, and ensure seamless operations, all while adhering to compliance regulations like FINRA, GLBA, DORA, GDPR, and PCI DSS.

Enter the Kiteworks Private Data Network. Kiteworks consolidates, controls, protects, and tracks email, file sharing, managed file transfer communications. A hardened virtual appliance, end-to-end encryption, digital rights management, detailed audit logs, and controls based on the NIST CSF ensure confidential client information is exchanged securely and in compliance.

Secure Client Communication

Financial advisors need to securely communicate with clients to share sensitive financial information. Traditional email can be insecure and lead to data breaches. Kiteworks provides secure email communication, ensuring that sensitive financial information is encrypted and only accessible to the intended recipient.

www.kiteworks.com

Secure File Sharing for Audits

During audits, financial institutions need to share large volumes of sensitive data with auditors. Insecure file sharing can lead to data breaches. Kiteworks provides a secure file sharing platform that allows financial institutions to share large volumes of data securely with auditors, ensuring data integrity and confidentiality.

Managed File Transfer for Transaction Data

Financial institutions often need to transfer large volumes of transaction data between systems. Insecure file transfers can lead to data breaches. Kiteworks provides a managed file transfer solution that enables financial institutions to securely transfer large volumes of transaction data, ensuring data integrity and confidentiality.

www.kiteworks.com

Secure Web Forms for Client Onboarding

Financial institutions often need to collect sensitive information from clients during the onboarding process. Insecure data collection can lead to data breaches. Kiteworks provides a secure platform for creating and managing client onboarding web forms, ensuring that the information collected is secure and only accessible to authorized personnel.

www.kiteworks.com

Secure Email for Client Statements

Financial institutions need to securely send client statements via email. Traditional email can be insecure and lead to data breaches. Kiteworks provides secure email communication, ensuring that client statements are encrypted and only accessible to the intended recipient.

Secure File Sharing for Mergers and Acquisitions

During mergers and acquisitions, financial institutions need to share large volumes of sensitive data. Insecure file sharing can lead to data breaches. Kiteworks provides a secure file sharing platform that allows financial institutions to share large volumes of data securely during mergers and acquisitions, ensuring data integrity and confidentiality.

Managed File Transfer for Regulatory Reporting

Financial institutions often need to transfer large volumes of data for regulatory reporting. Insecure file transfers can lead to data breaches. Kiteworks provides a managed file transfer solution that enables financial institutions to securely transfer large volumes of data for regulatory reporting, ensuring data integrity and confidentiality.

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Secure Web Forms for Loan Applications

Financial institutions often need to collect sensitive information from clients during the loan application process. Insecure data collection can lead to data breaches. Kiteworks provides a secure platform for creating and managing loan application web forms, ensuring that the information collected is secure and only accessible to authorized personnel.

Secure Email for Transaction Confirmations

Financial institutions need to securely send transaction confirmations via email. Traditional email can be insecure and lead to data breaches. Kiteworks provides secure email communication, ensuring that transaction confirmations are encrypted and only accessible to the intended recipient.
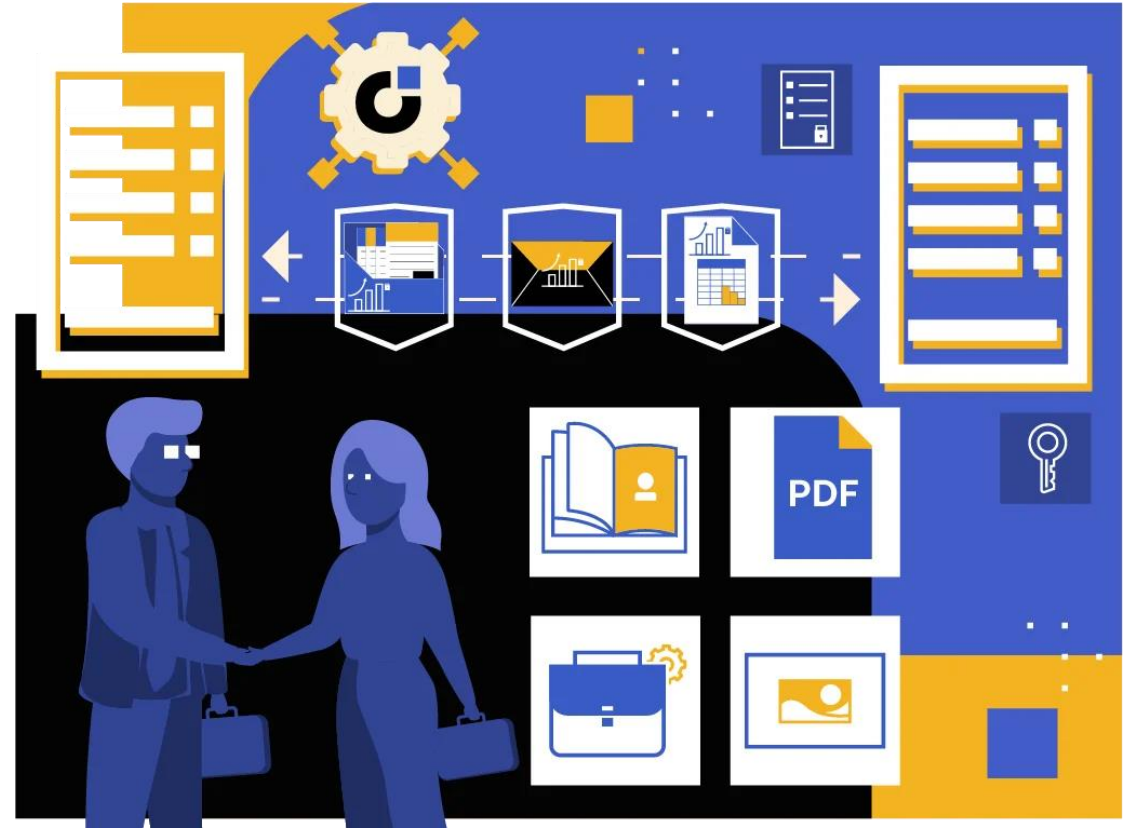
www.kiteworks.com

Secure File Sharing for Investment Analysis

Investment analysts often need to share sensitive investment data with clients. Insecure file sharing can lead to data breaches. Kiteworks provides a secure file sharing platform that allows investment analysts to share sensitive investment data securely with clients, ensuring data integrity and confidentiality
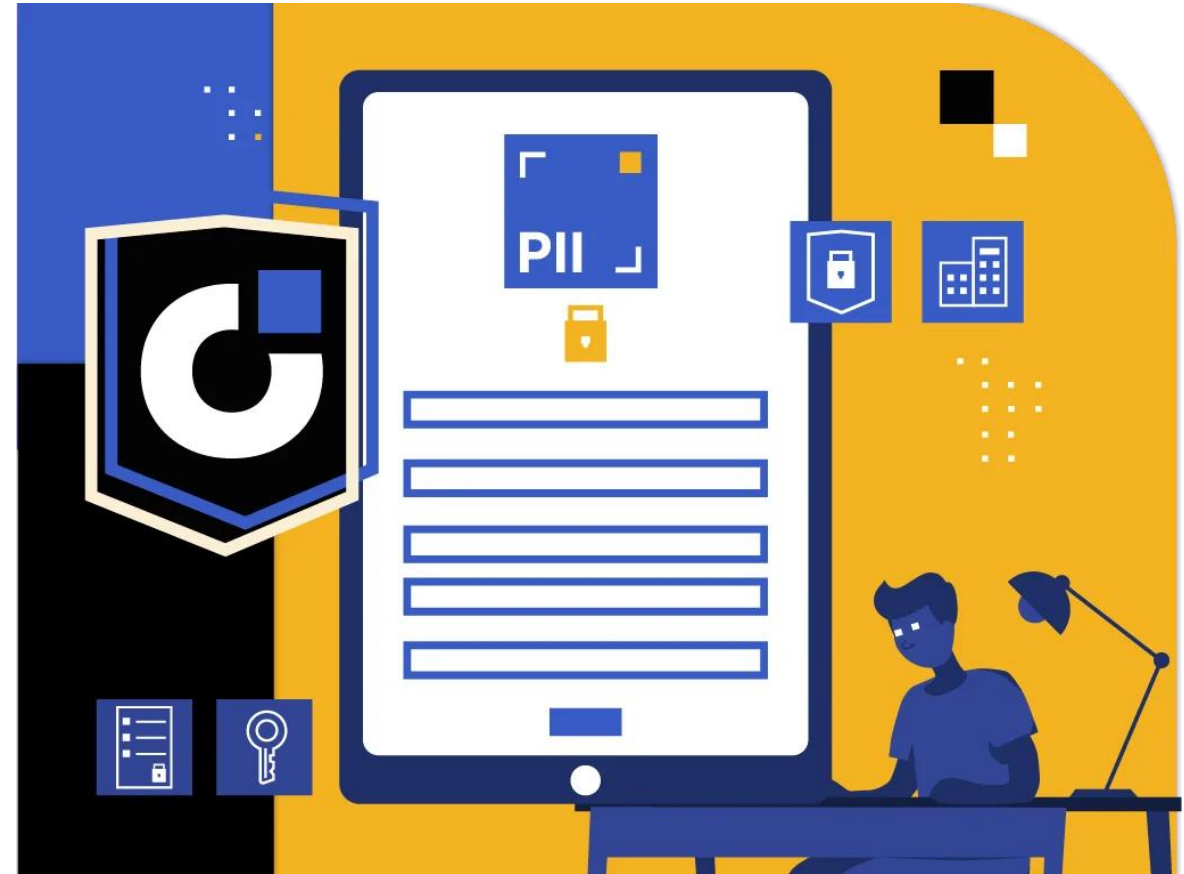
Managed File Transfer for Portfolio Data

Financial institutions often need to transfer large volumes of portfolio data between systems. Insecure file transfers can lead to data breaches. Kiteworks provides a managed file transfer solution that enables financial institutions to securely transfer large volumes of portfolio data, ensuring data integrity and confidentiality.

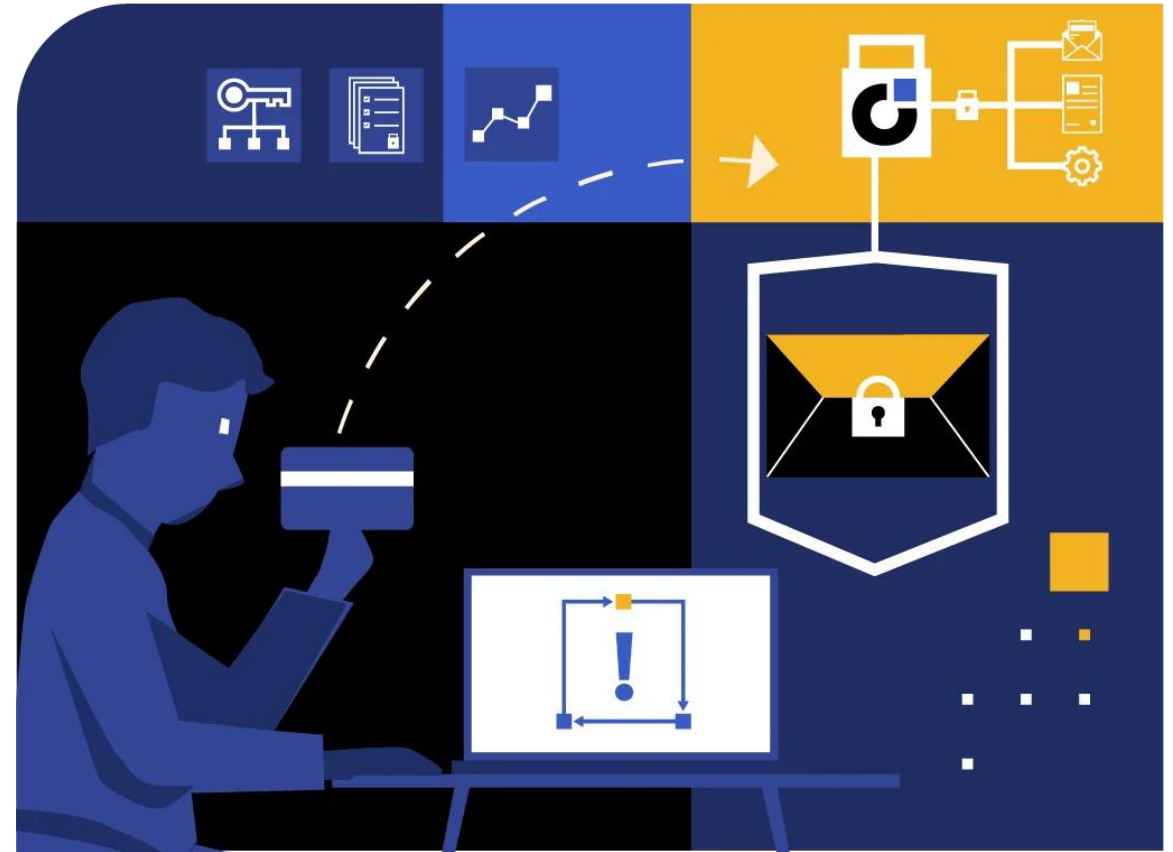# Secure Web Forms for Account Opening

Financial institutions often need to collect sensitive information from clients during the account opening process. Insecure data collection can lead to data breaches. Kiteworks provides a secure platform for creating and managing account opening web forms, ensuring that the information collected is secure and only accessible to authorized personnel.
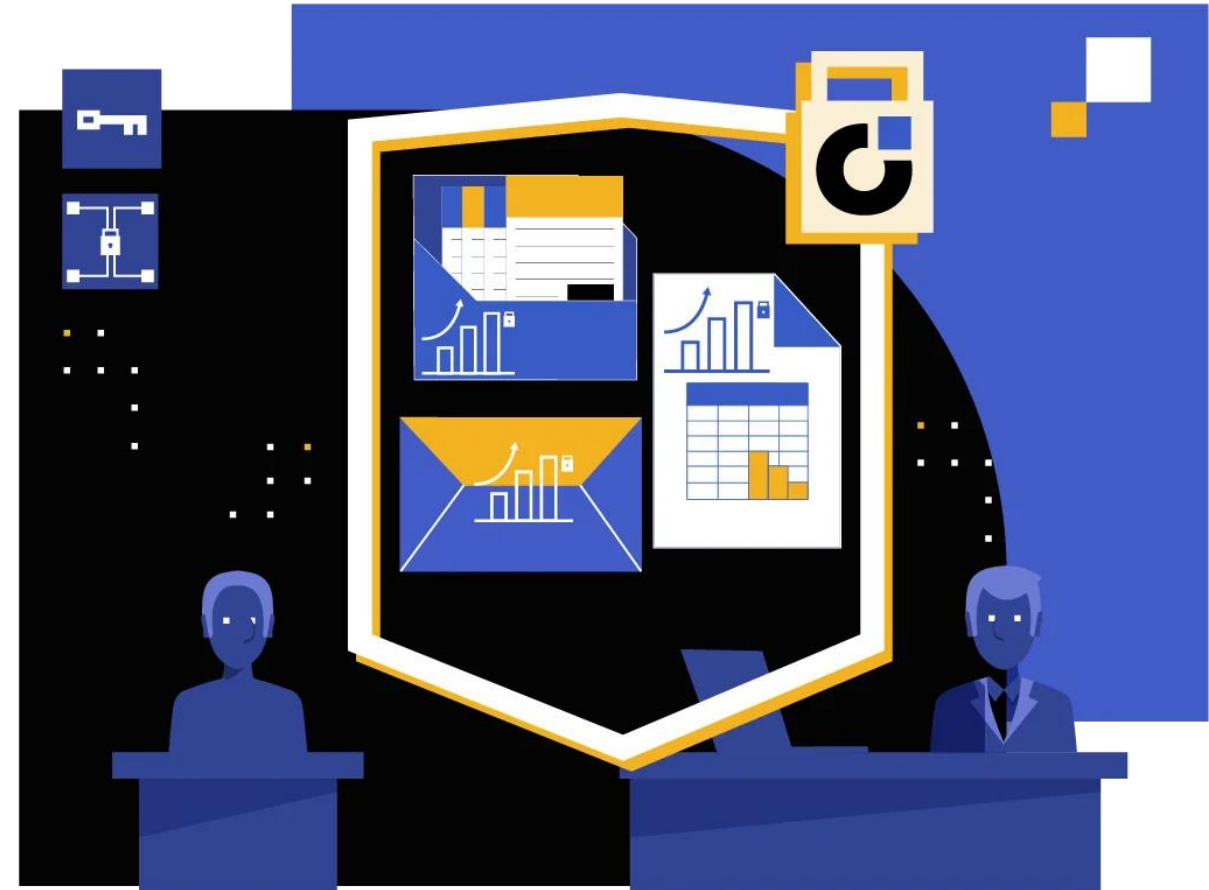
www.kiteworks.com

Secure Email for Fraud Alerts

Financial institutions need to securely send fraud alerts to customers. Traditional email can be insecure and lead to data breaches. Kiteworks provides secure email communication, ensuring that fraud alerts are encrypted and only accessible to the intended recipient.
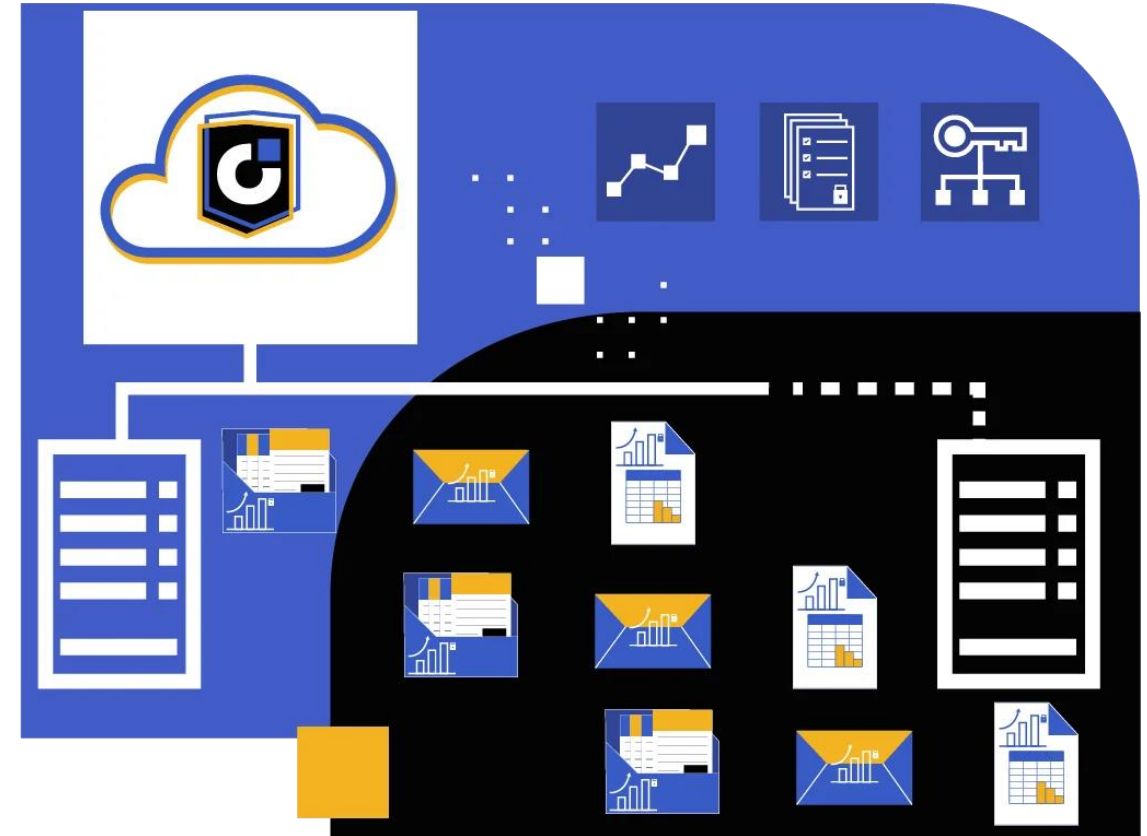
Secure File Sharing for Financial Planning

Financial planners often need to share sensitive financial planning documents with clients. Insecure file sharing can lead to data breaches. Kiteworks provides a secure file sharing platform that allows financial planners to share sensitive financial planning documents securely with clients, ensuring data integrity and confidentiality.

Managed File Transfer for Market Data

Financial institutions often need to transfer large volumes of market data between systems. Insecure file transfers can lead to data breaches. Kiteworks provides a managed file transfer solution that enables financial institutions to securely transfer large volumes of market data, ensuring data integrity and confidentiality.

Secure File Sharing for Legal Documents

Legal departments in financial institutions often need to share sensitive legal documents, such as contracts or compliance reports, with internal and external stakeholders. Insecure file sharing can lead to data breaches and noncompliance with regulations. Kiteworks provides a secure file sharing platform that allows legal departments to share sensitive legal documents securely with stakeholders. It ensures data integrity, confidentiality, and compliance with financial regulations. Features like encryption, access controls, and audit logs protect against unauthorized access or data breaches.