simplii FINANCIAL

Secured Messaging FAQ

1. What is Secure Messaging and why should I use it?

Secure Messaging is a tool used by Simplii™ to exchange confidential information, including personal information, in a secure manner with clients. It uses a third-party vendor solution called "ProofPoint" to securely exchange information. Using Secure Messaging is simple:

- When a Simplii employee or client needs to exchange confidential information, including sensitive personal information (such as account details, financial information, tax information, identification numbers, product applications, power of attorneys, etc.) by email, the Simplii employee initiates Secure Messaging.

- The first time you receive a secure message, you simply register your email account with a password in order to access the secure message. After that, you can access the secure message and future secure messages using your password.

- To review full terms and conditions please click here.

2. How long can I access my documents via secure messaging

The link in the secure message is valid for 30 days. However, after the link expires, you can continue to access documents sent to you by Secure Messaging by opening the attachment(s) enclosed with secure message. Opening an attachment will require the same level of authentication as accessing the link.

Encrypted documents sent via Secure Messaging will remain available on your email server for as long as your email service provider retains emails. Most email service providers (e.g., Gmail, Outlook, etc.) retain emails for a set period of time. Please contact your provider if you have questions regarding their email retention practices.

3. I've forgotten my Secure Messaging password. How can I reset or recover it?

You can recover your password by using the 'Forgot Password' button and entering the answer to your personal security question.

Note: The password and answer to the security question are case sensitive.
If you are unable to answer your security question, contact the Simplii employee you have been working with or call 1 888 723-8881 to get assistance with a password reset.

4. Can I get a Simplii employee to set-up my password for Secure Messaging?

No. Your privacy and confidentiality are important to us, so only you can set up your unique password for Secure Messaging.

5. Does Secure Messaging work on all smartphone devices?

Secure Messaging is compatible with smartphones running on the following operating systems:

- Apple iOS 7 and later
- Android 4.X and later

The functionality is the same when using a smartphone, tablet, laptop or computer:

- Complete a one-time self-registration process
- Read the secure message (sent from a Simplii employee)
- Reply, or Reply to All (attaching files if required)

6. Can I initiate a Secure Message to a Simplii employee?

Only Simplii employees can initiate Secure Messaging. Once this occurs, you can respond to it.

7. I need to send something to a Simplii employee that is confidential and includes personal information. Do I have to use Secure Messaging? Or can I just use regular email?

The security of your information is important to us and Secure Messaging is one of the ways we keep your information safe. If you need to send confidential information, including personal information, to a Simplii employee, please ask the employee to initiate Secure Messaging with you.

Messages sent via regular email can be lost, intercepted, misused or altered. Simplii will not be liable for the loss, interception, misuse, or alteration of any confidential information, including personal information, sent by email outside of Secure Messaging. For more information please click here.

8. Who can I go to if I need help with Secure Messaging?

If you need help to re-set your password or using Secure Messaging, the Simplii employee you have been speaking with can guide you through the process of using Secure Messaging or by calling 1 888 723-8881.

9. Can I use the same password for both my Online Banking and for Secure Messaging?

No. You shouldn't use your Online Banking password for Secure Messaging. You should use two different passwords to enhance security.