Applications:

- **Wealth management**
- **Training**
- **Customer support**

Key Features:

- **Secure virtual rooms for online meetings and presentations anytime**
- **Real-time document sharing**
- **Encrypted document storage**
- **Integration with MS Exchange Server and LDAP**
- **"Thin Client" design based on J2EE technology**
- **Scalable architecture**
- **Intuitive one-page interface**

Imagine meeting with clients at a moment's notice, regardless of location. Imagine sharing information in real-time, in almost any format. You can't always travel to your client, but with IsoSpace's scalable and secure Virtual Meeting Platform, you can provide the same outstanding level of personal service.

Secure Desktop Mirroring

Using IsoSpace's powerful "Show" feature, you can broadcast your IsoSpace workspace to others. To comply with prevailing bank policies, you're limited to sharing documents explicitly approved and uploaded by management.

You can resize and move the Show window to transmit different parts of your workspace, or you can maximize it to show your entire workspace. IsoSpace continuously broadcasts anything inside the Show window to every participant in the meeting.

By default, only content from within IsoSpace can be mirrored. Mirroring stops automatically when the Show window is moved over any application or over the Windows desktop.

However, your system administrator can easily reconfigure IsoSpace to mirror specific content, including information from proprietary applications.

Compliance with Bank Policies

We developed the Financial Advisor/Client edition of the Virtual Meeting Platform to meet your special compliance requirements.

As a financial advisor, you create virtual "meeting rooms" for each client. Only you and the client can enter. For clients, joining a meeting is as simple as clicking a link.

During meetings, you can page through documents together. Clients can even access documents in your virtual room outside of scheduled meeting times.
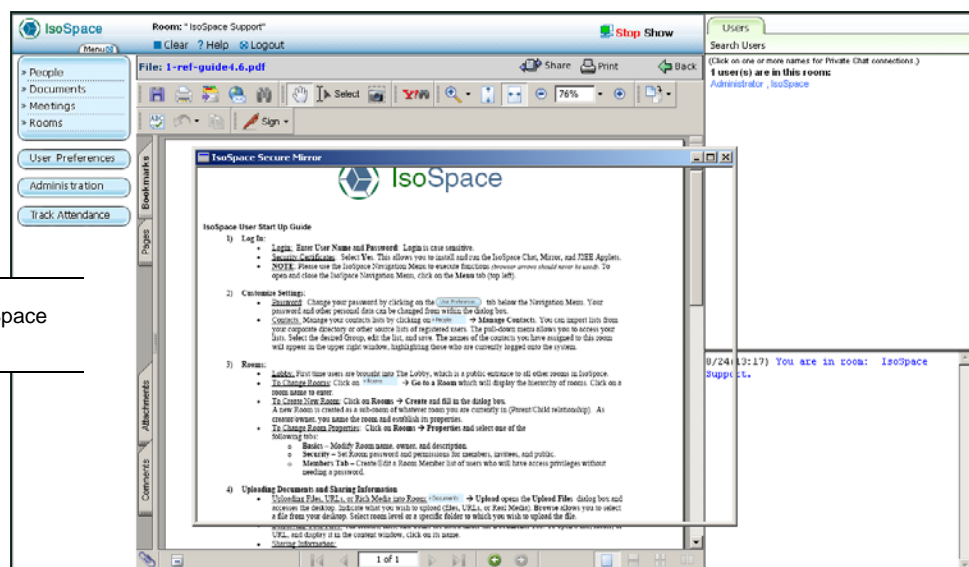
The possibilities are limitless. You can collaborate on:

- **Portfolio reviews**
- **Wealth management analyses**
- **Account updates**
- **Legal and accounting reviews**
- **Proposals**
- **Demos of proprietary Web-based applications**

Better Service with Less Travel

Consider this scenario: Your Private Client group wants to improve customer service to high net worth investors without increasing overall costs. Any solution must adhere to the Firm's strict policies governing communication with clients. The Solution?

The IsoSpace Interface

A client-hosted solution based on version 4.7 of IsoSpace —Virtual meeting rooms provide the forum for you and your clients to interact. To comply with prevailing bank policies, you're limited to sharing documents explicitly approved and uploaded by management.

The benefits? Faster client decisions, dramatic time and cost savings, and the highest level of customer service.

Scalable & Flexible Technology

You can install IsoSpace behind your corporate intranet's firewall, or use us to provide a secure, hosted service accessible through the Internet. Plus, thanks to industry-standard J2EE technology, IsoSpace is scalable. As the number of users increases, you can cluster multiple servers using Server Load Balancer hardware. Server load balancing makes multiple servers appear as a single server — a single virtual service — by transparently distributing user requests.

IsoSpace has minimal technical requirements for the end user and is compatible with most common operating systems and Web browsers. IsoSpace is a "thin client" application.

Six Levels of Security

Security is paramount to IsoSpace. Unlike any technology in the marketplace, IsoSpace allows true synchronous sharing of information without permitting any user to take control another user's desktop.

Our commitment to security is just one reason our clients include financial and government institutions including the Department of Defense.

For the Financial Advisor/Client edition, only managers can upload documents to virtual meeting rooms. Plus, automatic event logging tracks users as they enter and exit rooms, login and logout, and upload documents.

Other standard security features include:

- **No Socket Connection from PC to PC**
- **Single Sign**
- **Encrypted Room Passwords**
- **Secure Socket Layer For Data Transmission**
- **File Encryption**
- **Room/File Permissions**

Standard PC Client Requirements

Windows 95, 98, ME, 2000, or XP

Pentium 200 MHz

64 MB RAM

Display: 1024 x 768 pixels recommended

Microsoft Internet Explorer 5.0 or above

Sun Java VM 1.4.x or Microsoft Java VM 1.1

Internet connection (56K or higher)

Server Requirements

IsoSpace Server runs on the following operating systems:

Windows NT and 2000

Unix

Sun Solaris

IBM AIX

Linux

About IsoSpace …

Headquartered in the heart of New York City's financial district, IsoSpace specializes in enterprise solutions for collaboration and communication. IsoSpace's Web-based products provide a richer set of benefits with greater ease of use than any other collaborative software products in the industry. Solutions can include real-time document sharing and co-editing, communication through text chat and instant messaging, permanent encrypted online file storage, controlled meetings and presentations in permanent virtual rooms, and project management.

Contacting Us

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