

IT'S EVOLUTIONARY: A Document Custodian Perspective

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What Is A Document Custodian?

- Auditor
- Safekeeper of Documents
 - monitors/tracks follow-up documentation
 - monitors/tracks the release and return of collateral

First Steps

- Read,listen, and meet
- Form cross-departmental team
 - Management
 - Technology
 - Front line staff
- Get Involved In Industry Groups

Next Steps

- Meet with Trading Partners
 - Clients
 - Investors
 - Vendors
- Identify potential role change

Technologies

- Digital Signatures-PKI
- eVaults

Time Frames

■ Short Term

- Business Services--processes ancillary to your organization's core business

■ Long Term

- Product Services--processes core to your organization's business

Questions?