

At Addepar, safeguarding client information is part of the business. For secure communication and file exchange, they rely on SendSafely.



*Addepar provides an integrated software platform for financial advisors, family offices and wealth managers. Maintaining the confidentiality of client information is critical to the company's success.*

## The Challenge

The Addepar team frequently shares highly confidential documents with customers and third parties. While email is convenient, it is transmitted through numerous systems between the sender and the recipient. Any one of those systems can intercept and view the message and all attachments, which creates an unacceptable security risk. Their solutions for secure file exchange were inconsistent and ranged from encrypted ZIP files that were often stripped by email filters to Secure FTP, which is often blocked by corporate firewalls. The company needed an easy-to-use solution that would allow internal and external users to share data in a fast and secure manner.

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A key requirement for Addepar was the need to encrypt the entire exchange, end-to-end, from the sender to the recipient. Addepar wanted assurance that absolutely no one could view its sensitive communications other than the intended recipients. Addepar also wanted a solution that could be easily integrated into its existing processes so that users would be quick to adopt the solution.

### KEY CHALLENGES

- Desire for end-to-end encryption between sender and recipient
- Ease-of-use for non-technical users
- Integration with existing business processes for quick adoption

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*– Addepar Security Team Member*



## The Solution

A web-based encrypted messaging and file transfer platform that integrates seamlessly with Gmail for Business.

Addepar carefully evaluated different alternatives, ranging from on-premises PGP/GPG solutions to web-based products for secure file exchange. Many security products simply failed their stringent internal security review. The vast majority of solutions that met their security requirements were based on public key encryption, which required a significant amount of up-front setup and were difficult to use by all but the most technical of users.

With SendSafely, Addepar found the perfect balance of usability and security. "SendSafely hides the complexity of PGP/GPG under a simple user interface. Using it feels natural." explains a member of the Addepar Security team. The ability to integrate SendSafely with Google Apps Single Sign-On and Google Mail was also a game changing feature that put SendSafely ahead of the pack.

### **BUSINESS BENEFITS**

- Single Sign On using Google Apps
- Ability for users to send encrypted files directly from Gmail
- No upfront setup or on-site infrastructure to manage

Today, SendSafely is used by everyone at Addepar that deals with sensitive information, whether collecting data from new clients as part of the on boarding process or exchanging financial data with existing customers. SendSafely has become Addepar's recommended method for exchanging sensitive information. SendSafely's Personal URL feature, which provides a unique URL for each SendSafely user to receive files from anyone, is heavily used by Addepar's customer support team. "Everyone on our team has their personal URL embedded into their email signatures, which makes it easy for clients to send us confidential items using SendSafely", said a member of the support team.

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*- Addepar Support team member*

