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## NO COST

NetDocuments will offer a free upgrade to the cloud for current users of iManage, Worldox or OpenText until June 30, 2013.

Taija Sparkman • Jan. 23, 2013

The screenshot displays the Charles Schwab Advisor Services web application. The top navigation bar includes the Charles Schwab logo, "ADVISOR SERVICES", and user information: "Logged in as Marriott Murdock" with links for "Logout | Settings | Admin | Help". Below this is a secondary navigation bar with "Upload", "New", and a search bar containing "Aaron & Kristy Driggs". The main interface is divided into a left sidebar and a central content area. The sidebar contains a "CABINET Clients" dropdown, a "WORKSPACES" section with a search bar and a list of clients (including "Aaron & Kristy Driggs"), and a "RECENT CLIENTS" list. The central content area shows the "Home / Clients / Aaron & Kristy Driggs" path. It features a client profile for "Aaron & Kristy Driggs" with contact information. Below the profile are three document categories: "Activity", "Insurance Planning", and "Compliance". Each category lists documents with details such as version, last modified date, and document type. For example, under "Insurance Planning", documents include "Budget Proposal 10.5", "Cert. of Insurance", "Certificates of Insurance", "Costing worksheet", and "International insurance guidelines".

NetDocuments announced today that it will offer a free upgrade to the cloud for current users of iManage, Worldox or OpenText. NetDocuments provides cloud content management and collaboration services to organizations of all sizes, including Charles Schwab.

The promotional offer lets users upgrade from on-premise content management

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hardware-intensive systems and upgrade to our superior cloud-based service. By deploying to the cloud, organizations not only eliminate hardware, but benefit from increased disaster recovery, security, mobility, improved collaboration and infinite scalability.”

NetDocuments will handle the entire transition from on-premise to the cloud, which includes data migration, account configuration, administrative training and end-user training. The promotional offer covers the implementation cost, but users will be responsible for the cost of end-user training. In addition,

“There is substantial cost in moving data from servers to the cloud and, for large firms, the implementation costs can be a big portion of the total cost and a huge barrier to making the switch to the cloud,” said Marriott Murdock, Brand and Marketing Manager, NetDocuments. “By offering a free upgrade until June 30, we are hoping to help alleviate this barrier, while giving organizations enough time for due diligence – to do research and security checks, fill out forms and create a plan for migration.”

Firm Management

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