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www.ziptr.com

From the **April 2013 review** of client portal systems.

Best Fit: Ziptr is best suited for individuals and firms who need a standalone product for secure messaging and encrypted file delivery.

Strengths

- A simple to use tool with strong encryption that makes it easy to collaborate on confidential matters with users outside the firm. Users can verify that the other party has seen the message with return receipts.
- Ziptr allows users to send encrypted messages and files to other Ziptr users using a proprietary messaging application. Files are stored in a vault which is encrypted both online as well as on the user's hard drive with 256 bit AES encryption.
- The product is hosted on Amazon's secure data centers in two different US locations with failover. The Company has an independent attestation on its environment (SOC 3 last year, SOC 2 Type II this year).
- Outlook add-in reminds users to use Ziptr for secure communications instead of e-mail. E-mail messages in progress can be easily converted to Ziptr without leaving Outlook.
- When data is delivered to the third party, it is no longer stored on the Firm's portal (it is stored in the recipients portal with Ziptr), and the firm has no more responsibility for the data.

Potential Limitations

- The encrypted file vault does not have a traditional folder structure, although items can be categorized and filtered. Users with a large number of files in their

vault, especially if many have similar names, will need to use the included

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Ziptr is a simple application which is designed to provide secure messaging and file transfer between individuals and businesses. The service can be accessed through a web portal (my.ziptr.com) or a Windows client application which is available from the company's website. Users of the complimentary Ziptr Free service can access messages over the web, or can optionally install a Windows or Mac desktop app. The paid Ziptr Biz subscription level adds features like an Outlook add-in, user (employee) administrative control, custom footers, password policies, audit archiving and data retention.

Support is also accessed through the Ziptr client or website, and based on my experience, is very responsive to queries during their normal operating hours (7 AM-10 PM Eastern Time, Monday through Friday).

The application uses 2048 bit keys and 256-bit encryption to secure information between users. While the application is free for personal use (with 2 GB storage), business plans with 5 GB of storage per user start at \$10 per month, per user.

Data sent in Ziptr is stored on Amazon's secure data centers in two different US locations with failover. The Company has an independent attestation on Ziptr's operating environment (SOC 3 last year, SOC 2 Type II this year) which is available to users who sign a confidentiality agreement. The Windows client application stores the data in an encrypted vault on the user's local computer, and data is inaccessible without the user's login and password for Ziptr. Files and messages must be exported from the vault for archiving in a folder structure or a document management system.

Ziptr is a simple, secure way to send confidential messages and files to third parties, and its locally installed application is a welcome alternative to traditional portals for many users. While the company does not have decades of experience working with accountants like some competitors, my user experience was excellent, despite the

lack of integration with existing professional accounting software. Firms may want

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