



BIS Cosgrove Client Portal

What is a Client Portal?

The oxford dictionary defines a portal as a doorway, gate or other entrance. This literal definition gives us a great understanding of what a client portal is - a gateway of communication between you and us. Accessed directly through the BISCosgrove website, you can simply & securely upload and download confidential information at your convenience 24/7 from anywhere in the world.

Sniffing of emails refers to listening (with software) for packets of data of interest, this is also known as web trafficking. When sniffing software sees a packet that fits certain criteria, it copies the packet. Unfortunately as emails are sent though the Internet as plain text they can be very vulnerable to sniffing.

Email is a very efficient way to communicate, but extreme caution should be exercised in sending confidential information via email.

Why is email so unsafe?

- Email messages are sent in clear plain text, making them inherently vulnerable to any cracker who gains access to eaves drop and sniff your email.
- Email messages have to go through intermediate computers before reaching their destination, meaning it is easy for others to intercept and read messages.
- Many Internet Service Providers (ISP) store copies of email messages on their mail servers before they are delivered. The backups of these are usually unprotected and can remain for up to several months on their server, despite deletion from the mailbox.

Our Client Portal is protected by four layers of security:

Application Security

- 100% encrypted communications between all layers of the solution

Server Security

- Located in a secure data centre and all information on the servers is encrypted and non-recoverable in the event of theft or loss

Data Security

- Stored on encrypted disk volumes, on encrypted databases

Physical Security

- Biometric access data centre is manned 24x7 by security staff

Client View

From the menu up the top you can select My Files, General, Send a File or Contact Us.

My Files

Personal files sent to you by BISCosgrove.

General

General information files sent to you such as newsletters.

Send a File

This is where you can load and send a file to BISCosgrove. Simply select the folder in which you would like the file to be displayed, browse your computer for a file and send.

Contact Us

If you have any questions do not hesitate to give us a call or send an email.

Storing Documents

You will have 24/7 access to any documents you store on the BISCosgrove Client Portal. This makes dealing with your own personal finances easy and convenient.

Information of great value that can be stored includes:

Tax Returns & Financials

- We will load these for you and they will be stored for 3 years. If the bank requests any of this information simply login when you are at the bank and download a copy.

Key Identifying Numbers

- Creating a document that contains all of your key identifying numbers (ABNs, TFNs, ACNs, SFNs etc) so you have a place to go to quickly access this information whenever these numbers are needed.

Filing Cabinet

- Use the Portal as a filing cabinet and store important documents such as contacts, wills, trust deeds etc.

To store documents in your secure area bring them into our office and we will scan and load them for you.