Rooms

Work with your financial professional in one secure online space.

Share information, complete important tasks, and stay up to date with requests, documents and next steps, all in one place.

Share information, complete tasks and stay connected, securely



With Rooms, you can:

Share information securely

Exchange documents and sensitive information safely with your financial professional.

Keep everything in one place

Access your documents, forms, messages and tasks whenever you need them.

Complete tasks faster

Upload documents, complete forms and respond to requests in just a few clicks.

Stay informed and connected

Track progress, receive updates, and communicate with your financial professional in real time.

You'll receive notifications when there's something for you to review, complete or action.

How Rooms makes things easier

- Less email back-and-forth
- A secure way to share sensitive information
- Easier access to important financial documents
- Better visibility of outstanding requests and next steps

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