



The Impact of Tablets in Financial Services

Webinar
June 8, 2011

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BOARDVantage
Security with Simplicity



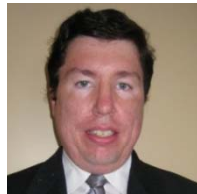
Moderator



Dan Liliedahl, Chief Technology Officer
TandemSeven



Panelists



Brent C. Haley, Managing Director,
Investor Services Distributed Systems
BNY Mellon Asset Servicing



Thomas Poppey, COO,
Global Securities Lending
Brown Brothers Harriman & Co.



Joe Ruck, Chief Executive Officer
BoardVantage





Ubiquitous

t7 tandemseven





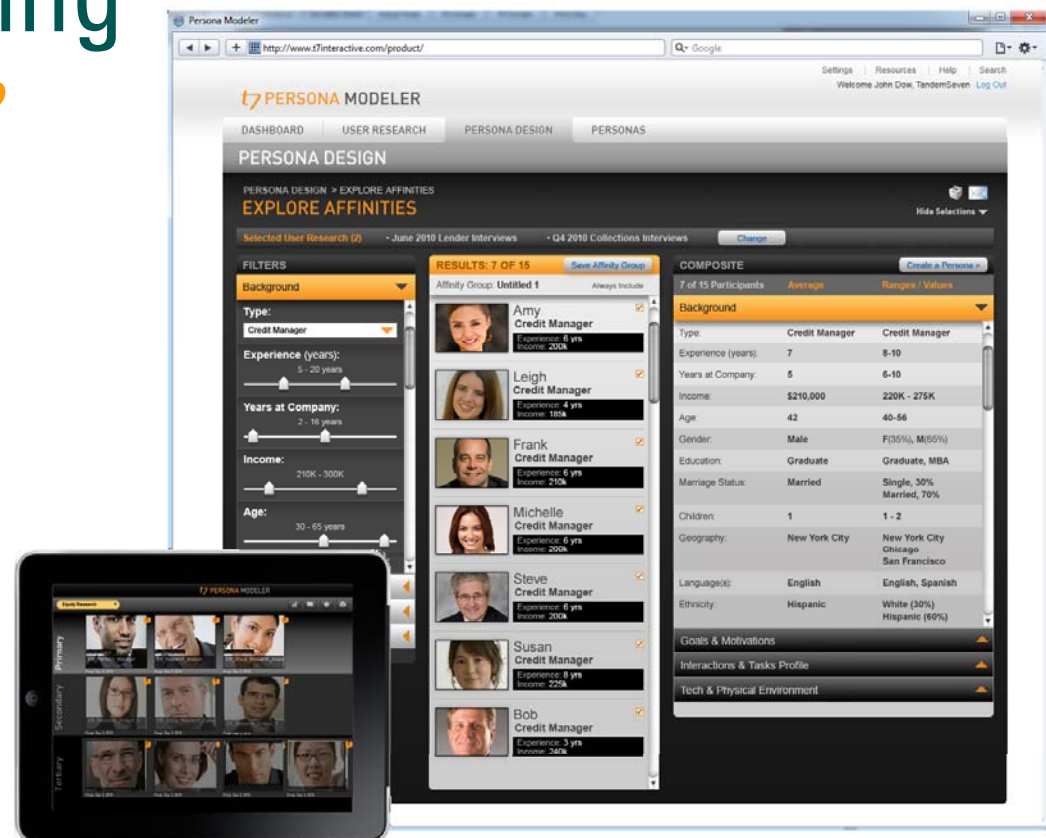
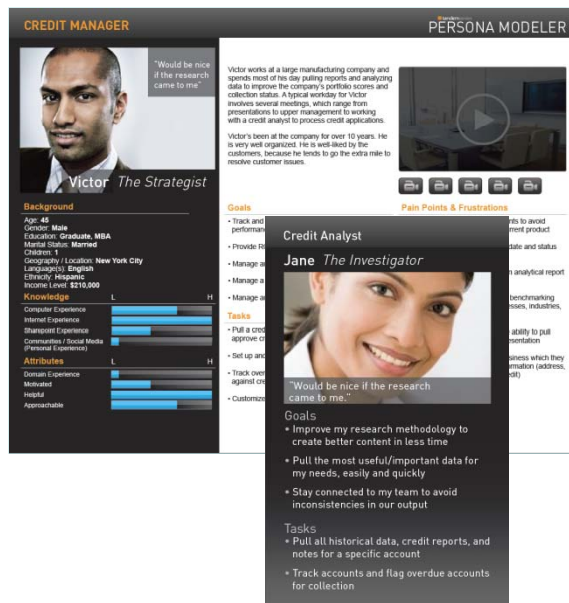
Productivity Effect





User Experience/ Persona Modeling

“Know thy user.”





Enterprise Mobility Strategy



- Mobile device market segmentation
 - What are your target devices?
 - Do you control the hardware?
- Development platform approach
 - Narrowly targeted native development (e.g., Objective C on iOS)
 - Widely targeted rich server-side applications (e.g., HTML5 and WebKit)
 - Application management—upgrades/maintenance
- Mobile Device Security Considerations
 - Offline data retention



Native Mobile Applications

- Predominant Application Paradigm
- Delivered Via App Stores
- OS Specific Languages/Frameworks
- Higher Development Costs
- Application Updates Primarily User Driven
- Best Device Interaction/Performance

Hybrid Applications

Native Applications that interact over web via services or rendered panels
HTML 5 Rendered locally on the device
Web Applications with presence on app stores; additional access to device capabilities via native technologies

Mobile Application Development Continuum

Mobile Web Applications

- Quickly evolving technologies (HTML 5)
- Centralized Maintenance/Updates
- Server/Company controlled security
- Lower cost, ubiquitous technologies
- Able to leverage existing investment in web based applications



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Mobile Application Security



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- Device security insufficient
 - Data at rest on device at risk
 - Resident application code at risk
- Phishing/cross site scripting easier
- Extension of existing security approach
 - Multifactor Authentication
 - Secure Protocols



Mobile Web Apps - HTML 5



- Highlights

- Seeks to provide an application foundation vs markup focused
- Improved Structure Elements
- Improved Error Detection/Handling
- Canvas (Graphics Rendering via Markup)
 - Markup based rendering
 - Scriptable
- Touch Enabled
- Direct embedding of audio/video
- Offline Storage
- Geo-location



Case Study

BROWN 
BROTHERS
HARRIMAN



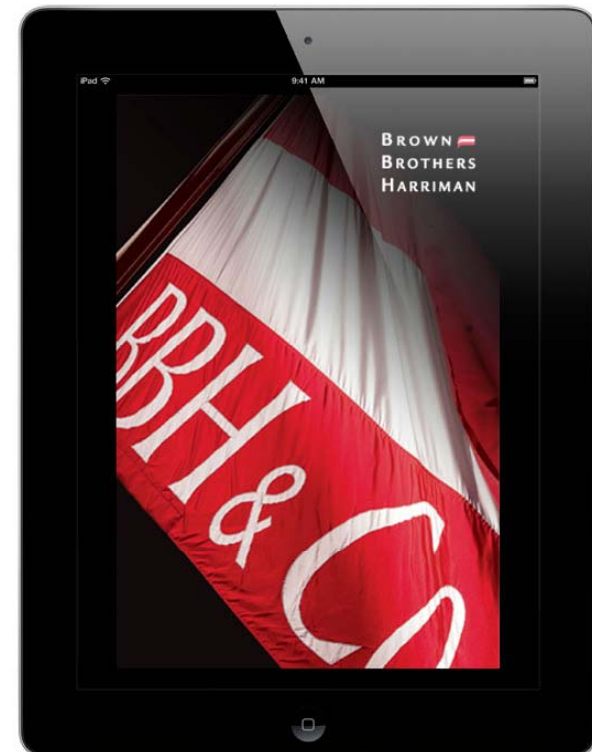
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BBH Securities Lending on Demand...

BBH clients receive:

- Immediate, encrypted access to program specifics
- Regular market updates, including information about what is driving a change in borrower demand and how it could affect your securities lending revenue
- Access to daily earnings, outstanding loan balances and loan distribution by borrower
- Ability to search for information about specific securities





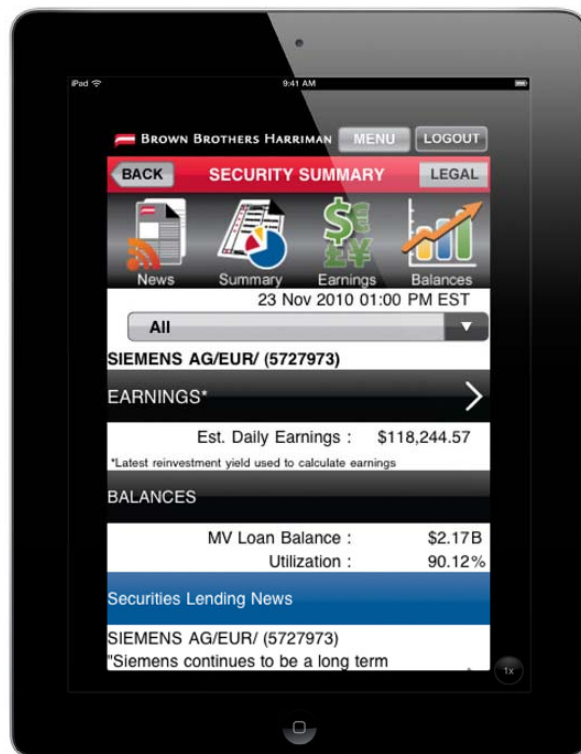
BBH Securities Lending on Demand...



Securities shown for illustrative purposes only. Not a recommendation to buy or sell any security.



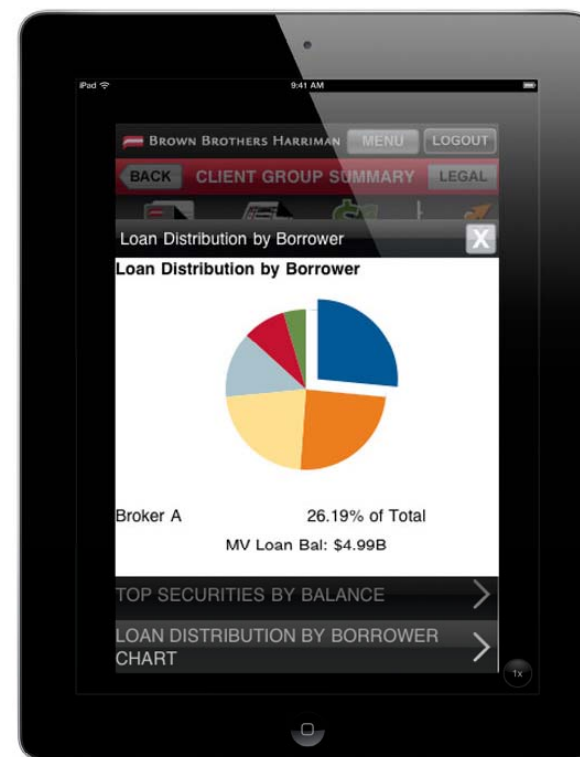
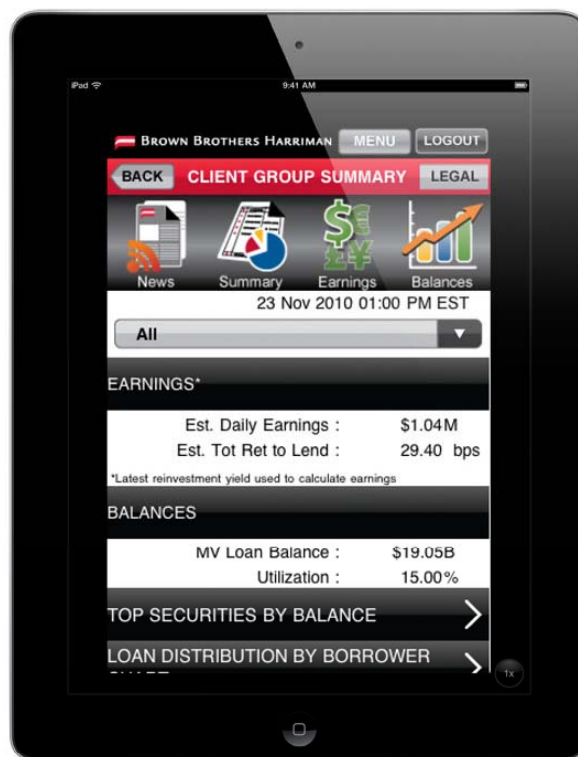
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BBH Securities Lending on Demand...



iPad® is a trademark of Apple Inc, registered in the U.S. and other countries



Case Study

- iPad in the Boardroom



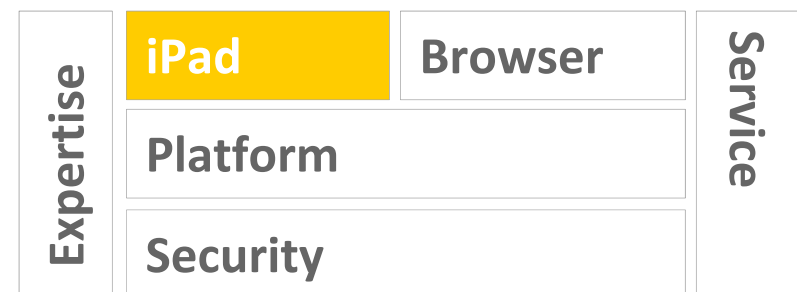
- **BoardVantage**

- Marquee provider of board portals
- Browser and iPad
- 400+ customers, F-500 centric
- Pure play board portal
- Boards and Leadership Team
- Menlo Park, CA, offices around US



- **Technology**

- Frontend
 - iPad for directors
 - Toolkit for admin
- Backend
 - Security
 - Platform





iPad for Board Work

Expertise	iPad	Service
	Browser	
	Platform	
	Security	

- Crossed a usability threshold

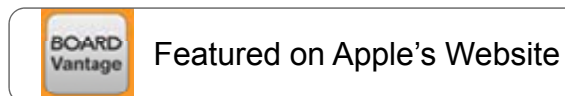
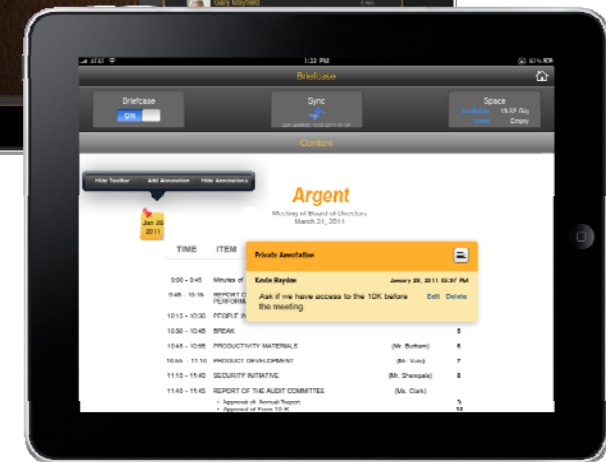
- Device
- App

- Meeting experience

- Birdseye and drilldown views
- In collaboration with Apple

- Benefits

- Superior to a browser
- Superior to print
- “Third Device”





Securing the iPad Offline

Expertise	iPad	Service
	Browser	
	Platform	
	Security	

- Offline Access
 - Prep for a meeting while in transit
 - At a remote location (e.g. vacation)
- Briefcase
 - Secure offline document access
 - Delete content and notes
 - Remote purge
 - Eliminates vulnerability

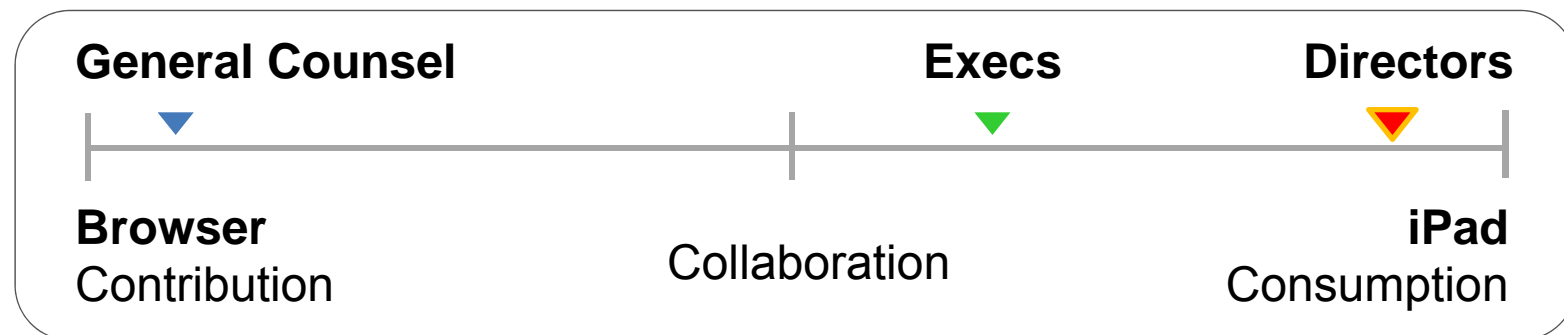




Browser and iPad Coexistence

Expertise	iPad	Browser	Service
	Platform		
	Security		

- **Directors**
 - Configuration to highlight essentials
 - Presentation graphics for enrichment
 - iPad and Browser
- **General Counsel Office**
 - Continuity with the desktop experience
 - Integration with desktop tools
 - Browser

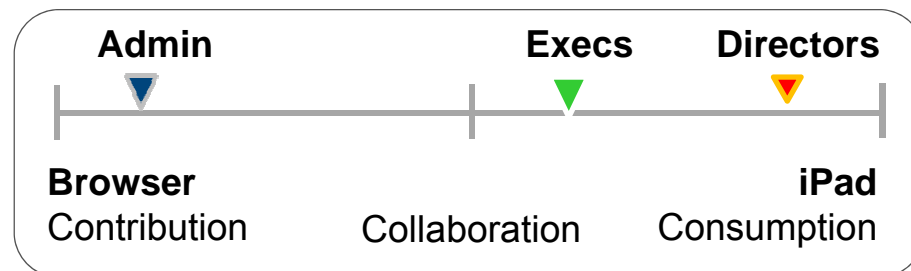




Presentation - iPad

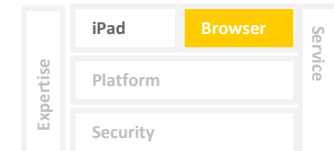
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	Browser	
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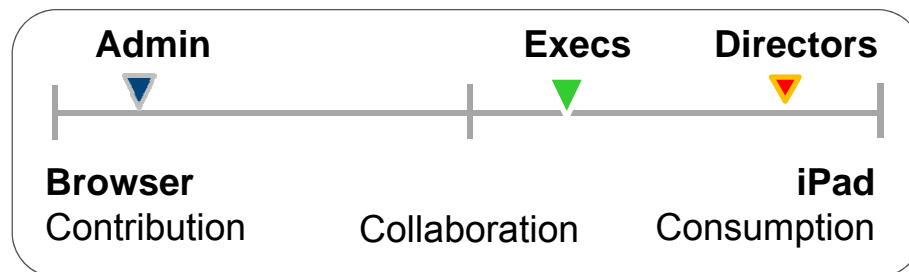
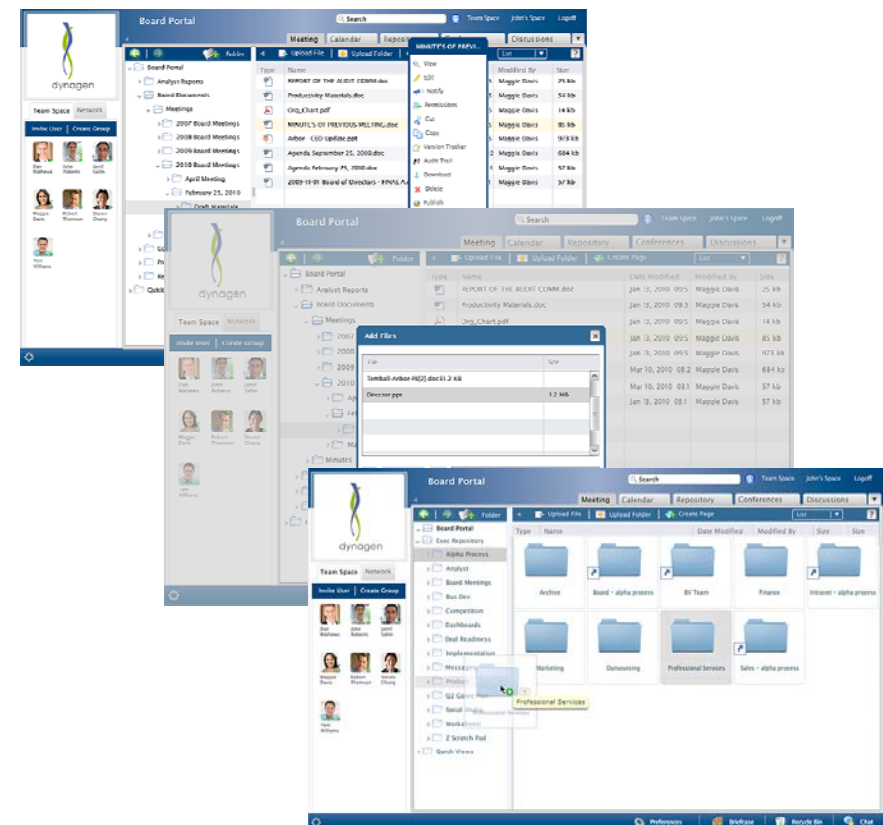


Desktop Equivalent - Browser



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Direction

Expertise	iPad	Browser	Service
	Platform		
	Security		

- Evolving Threat Environment > Ongoing Emphasis on Security
- Changing Nature of Board Work > High-Caliber Business Tools
- Consumerization of Software > Social Media, New Devices

Expertise	iPad	Browser	Service
	Platform		
	Security		

NextGen Platform



Q&A

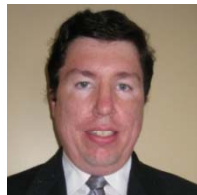
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