

Secure Personal Library Announcement

CenterPoint Financial has set up an account for each client through Net Documents for a Secure Personal Library, or “Share Space”. To ensure security, each client’s library is opened on an as-needed basis. In this way it serves like a vault. Any personal confidential information can be posted to this secure library. We consider the security of your information to be of the highest priority.

When invited to share your library you can send encrypted documents to us, and we will let you know via email when we have placed secure documents there for you.

Our Library Admin Specialist, Patty Valentine, will assist you to access and send documents. You can reach her at pvalentine@centerpoint-financial.com or 802-225-1314. Patty is available Tuesdays, Wednesdays and Thursdays from 9:30 AM - 3:00PM.