

Announcement: Your Secure Personal Library

We consider the security of your information to be of the highest priority. We have set up a secure Personal Library for you through the NetDocuments® platform. Your Personal Library serves as a vault for important documents you need to share with us. Any personal confidential information can be posted to this secure library.

When we ask you to upload documents to your Personal Library, you will receive an email from us with a secure link to your Personal Library. The documents you share will be automatically encrypted by the NetDocuments platform. Likewise, when we have documents to share with you, we will notify you by email that documents are awaiting your review.

Patty Valentine is the “Library Specialist” here at CenterPoint. As your Client Associate, she will assist you with accessing and uploading documents. Please reach out to Patty at pvalentine@centerpoint-financial.com or by phone: (802) 225-1314. Patty is available on Monday through Thursday from 9:30 am to 3:00 pm.