



“Securely transferring large financial files is easy with ShareFile.”

– Amanda Rogers
Customer Specialist, Finance

Customer Name
Diamond Hill Capital Management, Inc. (DHCM)

Industry
Financial

Location
Columbus, OH

Number of Employees
62

- Business Challenge**
- Exchange of client statements efficiently and securely
 - Email exchange proved to be time consuming
 - Other products cumbersome to the client

- Business Results**
- Enhanced security
 - Easy to access client documents
 - Clients are comfortable navigating the portal
 - Granular multi-level access permissions

How Diamond Hill Capital Management (DHCM) Uses ShareFile to Securely Send Client Statements

DHCM is a registered investment adviser and wholly owned subsidiary of Diamond Hill Investment Group, Inc. DHCM provides investment management services through mutual funds, separate accounts, and private investment funds.

Business Challenge

DHCM experienced the challenge of delivering client statements in an efficient, timely, and secure manner. Prior to ShareFile, the firm sent many client statements via email which proved to be very time consuming. The firm realized that each time a statement needed to be sent to a client; someone had to double check to make sure the right attachment was included to the correctly intended email address.

DHCM looked into other secure email products but they “Were not flexible and were very cumbersome to the client,” says Christen Biddlestone, Manager of Investment Operations at DHCM.

Business Results

The most important benefit of ShareFile to the firm is security. With ShareFile, “Clients are able to receive their statements, and other account related information, easily and securely,” says Christen.

Additionally, with ShareFile, clients find it easy to access their current and historical statements in one location and enjoy the ownership of their personal financial documents. “Using ShareFile is beneficial because it is easy to use and clients feel comfortable receiving their statements,” says Christen.