Building momentum

2014 Year in Review
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Accomplishments Accentuate Viewpointe’s Momentum

> 2014 was a momentum-building year for Viewpointe®. Our efforts since 2011 to launch and expand Viewpointe’s business by both researching and analyzing the information governance market while building and bolstering OnPointe® yielded milestone results.

We continued to pursue our dual mission of growing OnPointe, by adding new customers and partnering to drive value through implementation, while meeting the service and risk-management needs of our check-related customers. Both efforts remain necessary as we continue to expand beyond our check-archiving roots into information governance.

**Cloud-based services move to forefront**
Our ongoing assessment of market conditions indicates there is growing acceptance of the cloud as an information governance delivery model. In particular, companies are increasingly turning toward the private-hosted cloud delivery model. Given these trends, we are confident Viewpointe is operating in an area of significant activity and believe OnPointe is competitively positioned to benefit from the buying patterns likely to materialize over the next few years.

Many large companies are looking for ways to solve numerous information governance-related problems that are impeding their ability to remain agile. Some challenges are associated with aging systems and the difficulty of keeping up with technology changes, while others stem from the mounting volume of electronic information and the need to provide access to a diverse and mobile workforce.

> “With Viewpointe having a successful history operating in the highly regulated financial services industry, companies in other industries feel confident in our ability to identify, manage and protect their data via OnPointe.”

Lou Buglioli, Chairman and Chief Executive Officer
We continued to pursue our dual mission of growing OnPointe, by adding new customers and partnering to drive value through implementation, while meeting the service and risk-management needs of our check-related customers.”

Timothy Coff, President and Chief Operating Officer

Ultimately, companies want to know what their growing information management challenges mean for litigation readiness and overall costs. At the same time, these companies must address the risks posed by cybersecurity threats. These risks, combined with a growing number of high-profile data breaches, are driving companies to protect their data by updating and modernizing their systems.

Underscoring our efforts of the past several years is the recognition that Viewpointe is becoming the “go-to” provider. Companies are turning to Viewpointe and our leading technologies to solve fundamental company challenges by maximizing the value of their content while reducing the associated risk out of their critical business systems and processes. More companies are also seeking our help in defining the return on investment (ROI) and creating a business case to help justify their information governance program.

Sales extend beyond financial services
Among Viewpointe’s greatest accomplishments in 2014 was the expansion of our reach beyond the financial services industry. We proved our hypothesis that OnPointe is applicable outside the highly regulated financial services industry by closing two landmark deals—one in the insurance industry, the other in the auto industry. This significant development indicates there are “universal truths” among companies facing information governance challenges.

The addition of these new customers brought the total number of OnPointe projects in the implementation phase to 13 during 2014. Meeting the challenges of deploying several enterprise-wide applications simultaneously requires significant coordination and partnership with our customers. The technical and change-management aspects of these projects have made us relevant to every employee within these organizations. Although this is a huge responsibility, it is also a nod to the trust we continue to build with our customers.

Furthermore, the challenges associated with these projects led to improved best practices and processes, including reducing the time and costs associated with migrating customer data into Viewpointe’s private cloud. In addition to the benefits afforded our current customers, we will leverage these efficiencies during the sales cycle to better guide potential customers to solutions that will best fit their needs.

Other OnPointe milestones achieved in 2014 included delivering a record number of proposals (11) to potential customers. In addition, as of year-end our sales team was pursuing more than 40 business opportunities. Furthermore, our SLA performance was 99.9%, the best in company history, while our customer satisfaction survey also yielded the best results in company history.

A continued commitment to payments services
We also continued to nurture and deliver reliable, cost-effective solutions for the storage, exchange and settlement of payments. As expected, nationwide check volumes continued to decline in 2014, with more consumers converting to alternative payment sources. Nevertheless, our state-of-the-art check archive remained the repository of choice for many of the nation’s financial institutions, including our newest check archive customer, a New York-based institutional bank. We began the process of migrating the bank’s volumes of data to the Viewpointe check archive in 2014. Meanwhile, Viewpointe’s clearing and settlement services continued to provide cost-effective, fully automated solutions to financial institutions of all sizes.

We look ahead with optimism, believing the progress we have achieved during our 14-year history will continue in 2015. Our upbeat outlook largely stems from the experience we have gained, the marketing efforts we have launched and the precision with which we execute our private cloud-based solutions and manage content. Together, these factors have helped us earn our customers’ trust—an essential component of our continued success.

Sincerely,

Lou Buglioli, Timothy Coff
Chairman and President and
Chief Executive Officer Chief Operating Officer

Accomplishments Accentuate Viewpointe’s Momentum
Expanding Viewpointe’s Reach

Since launching OnPointe in 2011, we have steadily increased the platform’s capabilities and scope. The combination of growing demand for cloud-based information governance and increasing awareness and acceptance of our innovative, best-in-breed, customizable cloud-based service continues to fuel OnPointe’s momentum.

Entering new industries
Early on, we believed Viewpointe’s expertise in financial services would aid OnPointe’s efforts in that industry, and several leading financial institutions were among OnPointe’s first customers. We also anticipated our roots in the highly regulated financial services industry would pave the way into other regulated industries and companies facing complex regulations and legal requirements, as well as those overwhelmed by exploding volumes of electronic content. In 2014, we welcomed our first non-financial services customers—an insurance company and an automobile manufacturer.

These milestones highlight growing opportunities for OnPointe. Many large companies—within and outside the financial services industry—continue to struggle with maintaining aging systems while their electronic data volumes keep expanding. The companies’ inability to keep up with the pace of change not only is expensive, it also puts them at risk for cybersecurity attacks, data breaches and litigation.

A growing number of these companies are turning to Viewpointe for guidance and the jump-start they need to finally get their electronic content in order. Our reputation as a trusted service provider to financial services companies gives us an advantage among organizations facing mounting information governance challenges. Financial industry regulations are among the most complex and stringent. Because Viewpointe has a successful history operating in this environment, companies in other industries feel confident in our ability to identify, manage and protect their data via OnPointe.

“More companies are also seeking our help in defining the return on investment (ROI) and creating a business case to help justify their information governance program.”

Ben Golden, Chief Financial Officer
Among the many features distinguishing OnPointe are our partnerships. After formalizing our alliance program in 2013, Viewpointe continued to join forces with leading technology vendors, systems integrators and management consultants, ensuring our delivery of best-in-breed solutions. Specifically, we expanded our long-standing partnership with IBM to include new business development initiatives. We also renegotiated our strategic alliance with ZL Technologies, a provider of unified information governance for enterprise unstructured big data and our partner since 2012.

We will continue to collaborate with all our strategic partners to identify new business opportunities and develop new services to meet current and anticipated customer demands.

A key component of the ongoing sales process for OnPointe has been education—that is, informing potential customers of the value of information governance and the platform we provide. It is a two-part process that initially highlights the benefits of putting in place a comprehensive information governance strategy. This generally includes demonstrating the cost savings and efficiencies and risk mitigation effects the company will realize upon implementing a strategy. The second part involves outlining the advantages of making that a long-term OnPointe strategy.

Not surprising, this effort can require a lengthy timeline. The complexities surrounding a comprehensive information governance approach, apprehension among companies uncertain how to start the process and the rate and pace at which the market has been willing to accept the service are some of the main reasons the education/sales process remains time-consuming.

Nevertheless, our accomplishments in 2014 indicate our ongoing efforts have been successful. For example, OnPointe’s pipeline was twice as large at the end of 2014 as it was at the end of 2013, and the number of formal proposals distributed in 2014 increased 30 percent compared with the year prior. In addition, we improved our implementation timeframe, meaning companies were able to realize OnPointe’s benefits faster.

The ability to customize OnPointe to the specific needs of our customers remains an important competitive advantage, allowing us to respond to customer needs as well as changing industry dynamics. In 2014, we added more than 200 requirements to the OnPointe platform based on customer requests, market developments and analyst input.

We also enhanced the OnPointe platform in 2014. Among the most notable were updates released in February and October. In February, we announced our first release externally in conjunction with one of the largest legal technology events of the year. Our goal with this update was to help customers leverage existing content to maximize its value. In October, we announced additional enhancements to OnPointe, affecting all of the solutions. This update primarily focused on streamlining work processes, simplifying email and file migration, and improving the overall user experience via interfaces embedded in familiar applications, including Microsoft Outlook.
Committed to Our Core Check-Related Business

Check usage may be on the decline (see sidebar), but demand for Viewpointe’s check archive and clearing and settlement services remained robust in 2014. The Viewpointe archive remained one of the largest digital storage facilities in the nation. Most of the nation’s largest multinational banks continued to store their check and related images in the Viewpointe archive, and the vast majority of checks written in the U.S. were stored in the archive in 2014. At year-end, the Viewpointe archive contained nearly 155 billion images.

Archive advantages
Our flagship check archive continued to provide outstanding capacity and retrieval speed, offering customers the latest in on-demand access capabilities with a rate of up to 3,500 images per second. Furthermore, the Viewpointe archive continued to deliver operating efficiencies, risk management and cost savings. Archive customers realized an economic advantage with the Viewpointe consumption-based pricing model, which has proven to be a more attractive alternative than maintaining an in-house archive. Accordingly, we completed renewals and contract extensions with many of our customers, securing this business well into the future.

Cutting-edge payments solutions
Meanwhile, Viewpointe’s clearing and settlement services continued to allow financial institutions of all sizes to fully automate the image exchange and settlement of checks via one of the nation’s most advanced settlement systems. Viewpointe’s services let customers avoid the hassles and high costs of network exchanges, upgrades and technology refreshes, while offering the ability to customize check image presentations and settlement processes to their specific needs.

Fed study shows checks still significant
According to “The 2013 Federal Reserve Payments Study,” the average number of checks paid from 2009 to 2012 declined 9.2 percent annually, while the average value per check paid increased from $1,291 in 2009 to $1,420 in 2012. The Fed estimates 18.3 billion checks were paid in 2012, representing $26 trillion. This trend indicates consumers continue to use checks for larger bill payments, and businesses continue to write checks for payroll transactions and larger business-to-business payments.

According to the Fed in its latest (2013) payments study: “… checks’ diminishing share of the payments pie shouldn’t mask their significance in the payments system, as they are declining from a dominant position. The value of checks still represents one of the largest values in payment types, almost 44 percent.”
Many companies struggle with maintaining aging systems while their data volumes expand. Unable to keep up with the pace of change, the expense and risk have led many of these companies to turn to Viewpointe.  

Kevin Kearns, Chief Technology Officer

### Leading U.S. check archive

Viewpointe is committed to providing highly reliable, secure and high-performing products and services to our customers. Viewpointe monitors the systems with service-level agreement (SLA) measurement points, exceeding service commitments 99.9 percent of the time.

<table>
<thead>
<tr>
<th>Images loaded</th>
<th>Images retrieved</th>
<th>Peak daily loads</th>
<th>Peak daily retrievals</th>
<th>Total images*</th>
<th>Production changes</th>
<th>SLA measurement points</th>
</tr>
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<tr>
<td>2013</td>
<td>17.5 billion</td>
<td>3.73 billion</td>
<td>89.0 million</td>
<td>42.5 million</td>
<td>161.9 billion</td>
<td>4,101</td>
</tr>
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<td>4.39 billion</td>
<td>113.3 million</td>
<td>36.1 million</td>
<td>154.7 billion</td>
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Year-over-year change  

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* As of December 2014.

### Optimized exchange and settlement services

Viewpointe helps organizations of all sizes address their check clearing needs through our stable, secure and price-competitive image exchange network. Our Internet-based net settlement system provides reliable settlement for all electronic transaction types.

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<thead>
<tr>
<th>Annual ImageShare™ and exchange</th>
<th>Total dollar value</th>
<th>Annual NSS volume</th>
<th>Total dollar value</th>
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<td>3.1 billion</td>
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<td>4.3 billion</td>
</tr>
<tr>
<td>2014</td>
<td>1.5 billion</td>
<td>$2.3 trillion</td>
<td>2.9 billion</td>
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Year-over-year change

### Operating committee gives customers an industry-wide voice

The Viewpointe Clearing, Settlement & Association Services (VPCSAS) Operating Committee, which includes representatives from across Viewpointe’s membership base, remained an important vehicle for sharing best practices, discussing industry trends and issues, networking, and leading the industry in image-processing improvements. In 2014, the Committee reviewed such topics as retired routing number handling, cleaning up eligible routing transit numbers and how to enforce dollar amount limits prior to presentment. Participation is open to all Viewpointe image exchange financial institution customers.

### A dynamic technology backdrop

Throughout the year, Viewpointe maintained an ongoing, comprehensive program to enhance our technology platforms. We refreshed our server, storage and network platforms to improve the security, reliability and resiliency of our services, given ongoing and increasingly sophisticated security threats. We continued to closely monitor our systems for potential security threats. This proactive approach is designed to minimize the risk and potential effect of newly discovered vulnerabilities or hacking attempts to help ensure customer data held by Viewpointe remains secure. Additionally, Viewpointe completed more than 100 security audits, regulatory reviews and customer exams. We also continued to join forces with our customers to help make sure they meet their compliance and regulatory requirements.
An Upbeat View of Viewpointe

Customer satisfaction and industry recognition and accolades during 2014 were important testaments to Viewpointe’s best-in-class solutions.

**High customer marks**
Our most important audience, our customers, gave Viewpointe record-high marks in 2014. The results from our annual Customer Satisfaction Survey were the best in company history.

**Industry accolades**
Reviews from industry observers were equally favorable. Once again, Viewpointe was included among the prestigious FinTech100, the annual listing of the world’s top technology vendors that provide hardware, software and services to banking, insurance and capital markets firms globally. Published by IDC Financial Insights in partnership with Bank Systems & Technology, the list acknowledged Viewpointe for the ninth-consecutive year.

According to IDC Financial Insights, “The FinTech ranking is the most comprehensive global measure of success among technology providers to the financial services industry, bringing the most innovative, efficient, and effective technology solutions to financial institutions. Viewpointe’s prominent position on this list demonstrates its strength and impact on our industry.”

Viewpointe also was included in the inaugural FinTech Forward rankings, a new initiative introduced by American Banker and the financial services association BAI focused on providing institutions with information and perspective to aid in future technology decisions. The 2014 FinTech Forward 100 ranks the leading technology providers in the world based on year-end revenues from financial institutions attributable to hardware, software or services.

“The progress we made in 2014 regarding growth in our OnPointe sales, pipeline and proposals will open up new markets and customer opportunities for Viewpointe in 2015 and beyond.”

Mark Ryan, Executive Vice President, Sales and Customer Care

Viewpointe 2014 Year in Review
We seek to strengthen our relationships with customers and partners. The OnPointe platform is ideally suited for this strategy, as customers can deploy individual solutions over time, rather than implementing an all-encompassing IG program immediately.

William Shute, Chief Strategy and Marketing Officer

Magic Quadrant recognition

In another first for Viewpointe, Gartner identified Viewpointe as a “Notable Vendor” in its 2014 Magic Quadrant for Enterprise Information Archiving, affirming our efforts and the market’s response to the Viewpointe information governance offering. Gartner, a well-regarded information technology research firm, named Viewpointe a notable provider in the financial services industry.

Among other benefits, Gartner highlighted OnPointe’s ability to support a variety of content and provide a scalable infrastructure to manage archiving, content management, retention management, text analytics and eDiscovery. In the report, Gartner also noted OnPointe is “appropriate for information governance in large organizations, namely in financial services.”

Viewpointe joins advisory board, think tank

In a testament to Viewpointe’s long-standing relationship with owner and technology partner IBM, the technology giant invited Viewpointe to join its invitation-only IBM Cloud Advisory Board. The board, which includes a select number of IBM’s customers, provides a forum for IBM executives, clients and partners to share experiences and best practices, help shape IBM roadmaps and network with industry colleagues.

In addition, Viewpointe announced its partnership with the Information Governance Initiative (IGI), an information governance think tank comprised of companies and organizations focused on information governance as well as a forum for sharing ideas, facts and techniques. Viewpointe and IGI launched the partnership to advance a wider, more accurate understanding and adoption of information governance throughout the marketplace. Viewpointe participated in several initiatives with the IGI throughout 2014, which furthered Viewpointe’s position as a thought leader for the industry as a whole.

Moving our message


In addition, Viewpointe employees participated in various industry and customer events and forums in 2014, including:

- LegalTech New York 2014
- 2014 ARMA International conference
- IBM Insight
- MER
- CIO Finance
- CIO Insurance
- Information Governance Exchange
- NetApp Financial Services Forum
Viewpointe remained an advocate for industry advancement, publishing two important research papers during 2014. In “Information Governance: Shifting the Paradigm,” Viewpointe expanded on an IDC study to address opportunities cloud-delivered services can bring to regulated industries. Focusing on information management IT delivery models, the research showcases the success cloud-delivered services have had with providing a less-costly, higher-functioning solution to regulated industries and information managers.

In addition, Viewpointe published “Not All Clouds Are Created Equal,” a whitepaper from Kahn Consulting. The paper explains how the drivers for cloud services have shifted and are no longer storage-centric; rather, they are focused on providing competitive agility and business efficiency. It explains the various cloud services models and outlines the necessary due diligence for selecting an appropriate vendor.

Upgrading our web presence
We redesigned Viewpointe.com to better reflect the direction of Viewpointe’s brand and company strategy. Providing an improved user interface, ease-of-use navigation and optimized mobile experience, the content-driven site offers interactive thought leadership created to deliver enhanced value to customers, prospects and partners. The introduction of a new blog, Pointe of View, allows the Viewpointe team to share informed perspectives, while integrated social media and a plethora of new and updated content provide additional opportunities to interact with and hear from Viewpointe experts.

Topics addressed via our Pointe of View blog include:

- **10 Rules to Help You Survive the Big Data Apocalypse**
- **Beyond the Heart of Content Archiving**
- **Regulators to Banking Vendors: “We’re Turning Up the Heat”**
- **Cloud Vendor Relationships**

In addition, the new Viewpointe.com includes a video library, featuring discussions with Viewpointe executives and other industry leaders. Topics addressed in 2014 include:

- Choosing the Right Cloud
- Modernizing for Today’s Needs
- Built to Protect Your Information

Courting our prominent prospects
We also hosted an industry forum for a select group of companies (representing key prospects) in Boston in August 2014. The OnPointe Industry Forum is an invitation-only, interactive event focused on bringing like minds together. The Forum combines leaders from the analyst community, industry peers and the Viewpointe team to provide a unique opportunity to delve into the common challenges and concerns, approaches for success and best practices when it comes to the proper management and governance of data as heavily regulated business transforms to the cloud.

The agenda consisted of educational presentations, case studies, panels and roundtable discussions that addressed what really needs to be considered when looking at IT and ECM modernization and information governance in the cloud, especially in an era dominated by exploding data volumes, regulatory compliance and litigation. Timely topics included strategies for mitigating corporate risk, harnessing information growth and information value, and building the business case for, and the economics of, information governance in the cloud.
Maintaining the Momentum

We believe the accomplishments we achieved throughout 2014 will drive continued momentum and enthusiasm for Viewpointe during 2015 and beyond. As we noted over the last few years, the key to Viewpointe’s long-term growth rests with ensuring OnPointe’s continued success. And although the payments business continues to evolve, check usage likely will remain an important payment vehicle for many more years. Accordingly, we will continue to nurture and refine our core check-related business, ensuring our clients receive cutting-edge technology and services.

Opportunities for OnPointe
The progress we made in 2014 regarding growth in our OnPointe sales, pipeline and proposals will open up new markets and customer opportunities for Viewpointe in 2015 and beyond. Similar to the path of success for Viewpointe’s check-related business, our growing set of implementations, case studies and lessons learned enhanced our value for new OnPointe customers.

In addition, we expect our “land and expand” strategy to continue to fuel the growth momentum for OnPointe. Through this approach, we seek to strengthen our relationships with existing customers, long-standing technology partners and management consultants. The OnPointe platform is ideally suited for this strategy, as customers can deploy individual OnPointe solutions over time, rather than implementing an all-encompassing information governance program immediately. Once a customer realizes the value of a particular component, we will seek to continually expand our presence within the company, ultimately providing the customer with a comprehensive information governance solution.

Furthermore, we foresee opportunities to expand the OnPointe platform to include other capabilities and services. For example, we expect companies that have implemented an information governance strategy for their unstructured content to seek similar solutions for their structured content. We are also exploring ways to help companies apply analytics to their content and deliver other complementary services via the assistance of our technology partners.

“Viewpointe continued to join forces with leading technology vendors, system integrators and management consultants, ensuring our delivery of best-in-breed solutions.”

Berk Mesta, Executive Vice President, Strategic Alliances and Business Development

Viewpointe 2014 Year in Review
Streamlining our Professional Services
Companies looking to solve the challenges associated with increased volume and complexity of highly regulated information can address these challenges with the assistance of Viewpointe’s Professional Services, recently streamlined to help companies transition to the cloud and achieve long-term information governance success. Viewpointe Professional Services offers companies guidance in identifying, managing and controlling their data via:

- **Assessment Services.** Many companies realize they have challenges surrounding the proper management, security, retention, search and retrieval and disposition of their data, but they don’t know how to begin addressing them. Viewpointe’s Information Governance Assessment Services help these companies identify their information governance needs and build a business case for a comprehensive strategy.

- **OnPointe Delivery Services.** These services encompass the tasks necessary to implement OnPointe into production, including project management, data migration, design, testing and training.

Reliability remains the hallmark of our check-related services
Meanwhile, we also will continue to deliver the reliable services Viewpointe’s check archive, image exchange and settlement services customers demand. Given the ongoing and increasingly sophisticated cybersecurity threats to the financial services industry, we remain vigilant in our efforts to maintain a secure, efficient payments system. We are equally as attentive to our risk management responsibilities, maintaining a proactive stance toward the regulatory compliance, disaster recovery and business continuity planning objectives of our valued customers.

Pursuing a balanced approach
Viewpointe’s overall strategy is to balance near-term execution with our longer-term vision. This vision includes growing OnPointe through new customers and added implementations of our solutions in a scalable, repeatable fashion, while continuing to meet the needs of existing customers who throughout our 14-year history have relied on Viewpointe for secure, reliable check-related services and risk management.

“We are attentive to our risk management responsibilities, maintaining a proactive stance toward the regulatory compliance, disaster recovery and business continuity planning objectives of our valued customers.”

**Sean Laurell**, Executive Vice President, Information Management Services

We will continue to execute this strategy in the coming years, strengthening our core businesses and delivering the innovative, cost-effective solutions companies need to manage their ever-expanding data volumes and meet regulatory and legal requirements. The financial services industry traditionally has been our primary customer base, but as we proved in 2014, Viewpointe’s capabilities and benefits extend to other industries. We will continue to explore opportunities to leverage our successes and expand our reach into new markets.
Leadership and Core Values

Viewpointe Leadership

Lou Buglioli  
Chairman and Chief Executive Officer

Ben Golden  
Chief Financial Officer

Kevin Kearns  
Chief Technology Officer

Mark Ryan  
Executive Vice President, Sales and Customer Care

Sean Laurell  
Executive Vice President, Information Management Services

Timothy Coff  
President and Chief Operating Officer

Stephen Lapham  
Chief Administrative Officer and General Counsel

William Shute  
Chief Strategy and Marketing Officer

Reed Irvin  
Executive Vice President, Product Development

Berk Mesta  
Executive Vice President, Strategic Alliances and Business Development

Board of Managers

Viewpointe’s Board of Managers represents the six corporations that maintain an ownership stake in the privately held company.

Mike Adornetto  
Bank of America

Jerry Enos  
Wells Fargo

Lewis Fischer  
JPMorgan Chase

Anil Cheriyan  
SunTrust

Jeff von Gillern  
U.S. Bank

Brian Whitfield  
IBM

Viewpointe Core Values

Values make up the fabric of our company. They are what we believe in and what we do, and our values govern our decisions on a day-to-day basis. They are the reason for our success and the framework upon which we will continue to grow and prosper.

➢ Integrity  
Maintain the highest ethical standards. Practice honesty and integrity with our owners, customers, our people, partners and the industry.

➢ Customer Focus  
Anticipate and exceed customer needs. Our customer’s success is our prosperity.

➢ Value Creation  
Create value for our owners, customers and our people. Utilize sound financial thinking and practices in all our actions and decisions.

➢ Respect  
Treat all our business relationships with respect and dignity. We value our differences in thought, style, cultures, ethnicity and experience—understanding that diversity and inclusion are good for business and make our company stronger.

➢ Innovation, Leadership & Execution  
Encourage our people to be creative and challenge the status quo while, at the same time, execute superbly. Lead by example!

➢ Teamwork, Trust & Passion  
We will succeed together! We have the trust and confidence in each other and passion for achieving.