

Mobile Device & Usage Policy

Policy Statement

This policy applies to anyone who will be obtaining a company issued mobile device or who is currently using a company issued mobile device. The mobile device is primarily a business tool and its use must comply with all requirements of the policy as outlined below as well as any additional applicable policies and procedures.

Supported Carriers

The Firm has entered into corporate agreements with AT&T and Verizon (Select Carrier). Both carriers have provided the Firm with significant discount structures. Participants may select their device from either of these carriers.

In determining what carrier(s) will be supported, a few key points need to be considered before making a selection:

- Coverage
 - Location of employee and client
- Offerings
 - Discounts
 - Devices Models/Special pricing
 - Customer Support
 - Other Contract Offerings
 - Waived Activation Fee/Termination Fee
 - Rate Plans
 - Length of Contract

Supported Devices

The Firm has pre-determined a list of approved Smartphone and Cell Phone devices for those eligible employees. These mobile devices will be given to eligible employees based on business needs as a productivity tool.

Smartphones

Smartphone devices will only be approved for those eligible employees that have a business need for data services. The Firm has chosen selected Smartphone devices from each of our carriers which will allow for you to securely connect to the Firm network and applications. These devices will provide you with the capability of utilizing standard email, contacts, and calendar services as well as the Firm standard application software such as Time Entry, Document Management Access, and other services in accordance with the technology objectives of the Firm. In addition, Smartphone devices can be monitored remotely to provide additional security and to ensure that the proper Security Policies are in place. To view the approved list of Smartphone devices please visit www.approvedSmartphones.com. Any Smartphone not on this list is not approved and will not be approved for purchasing.

Cell Phones

For those eligible employees that don't have a business need for data services, a Firm approved Cell Phone will be provided for business purposes. To view the approved list of Cell Phone devices please visit www.approvedCellPhones.com. Any Cell Phone not on this list is not approved and will not be approved for purchasing.

When selecting what device(s) will be supported, will depend on the need of the firm and employee. In addition, when selecting a Smartphone type device you'll need to determine a management solution for the preferred device(s).

- Cell Phones
 - Voice Usage
 - Minimal Data Usage
- BlackBerry – BIS vs. BES
 - Voice Usage
 - Extended Data Usage
 - Email
 - Web
 - Calendar
 - Other Applications
 - Excel, Word, PPT
- Windows Mobile/ iPhone/Android – POP, IMAP vs. Good, Mobile Iron, Sybase, etc.
 - Voice Usage
 - Extended Data Usage
 - Email
 - Web
 - Calendar
 - Other Applications
 - Excel, Word, PPT
- Aircards
 - Data connection for PC

End User Segmentation

The Firm has positioned each employee into a specific user group based on their role at the Firm that will determine which mobile device each employee will receive if at all. The outline below will help you to identify what mobile device you're eligible for. If you're uncertain with what group you fall under, you'll need to meet with your manager for assistance.

- Executives/Management – Smartphone
- Partner/Non-Partner - Smartphone
- IT – Smartphone
- Non IT/Administration – Cell Phone
- All other – No mobile device

Break your employees into specific groups by job title or responsibility. This will help you determine which device each group will receive as well as what types of approvals will be needed for each group.

- Executives/Management
- IT vs. Non IT
- Partner vs. Non Partner
- IL vs. CL
- Salary vs. Hourly

Security & Safety Policies

Applications/Downloads

For those employees who utilize Time Entry, Document Management Access or other Firm approved applications, you will be able to use on your Smartphone device only. For those employees using a Cell Phone and use Time Entry, Document Management Access or another Firm approved application will continue to use these applications in the fashion that you're using them today. No other application outside of the Firm approved applications can be used/downloaded onto your Smartphone device without approval from IT Management.

Outside of the standard applications that are on a Smartphone (phone, email, calendar, etc.) does the employee use other applications to complete their job day-to-day? Can the application be supported on the approved device?

Passwords

It is required that all Smartphone devices be password protected. You will be required to know what that password is and to not distribute to anyone. If you forget your password you will need to contact your internal IT Helpdesk to have your password reset.

CL to IL (Corporate Liable to Individual Liable)

It is the Firm's policy that the wireless numbers associated to all Firm issued Smartphone and Cell Phone devices are Firm owned. There will be no approval granted to an employee to seize their wireless number upon separation from Firm. Employees may elect to transfer their personal number to the Firm issued mobile device. If an employee that transferred their personal number to the Firm separates from the Firm and wishes to transfer their number back to personal device, approval will not be granted.

Lost or Stolen Device

If a Firm owned Smartphone or Cell Phone device is lost or stolen, the employee is responsible for contacting their internal help desk immediately. A replacement Smartphone or Cell Phone will be provided upon manager approval.

Driving Safely

Employees are prohibited from using Firm issued mobile devices while driving. Before using a Firm issued mobile device, employees are expected to pull off to the side of the road and safely stop the vehicle. Employees are expected to abide by all applicable laws covering the use of Firm issued mobile devices while driving regardless of whether the vehicle is a Firm-Owned vehicle.

Having security policies put into place will provide your firm with a healthy and protected wireless environment. Below outlines some areas to consider when putting a security policy into place for your firm.

- Policy Compliance
 - BES – 100% compliant using BES
 - BIS is available however; this does not include corporate email
 - Windows Mobile/iPhone – Active Sync 100% compliant
 - BES like solution for non-BlackBerry devices - Good, Mobile Iron, Sybase, etc.
- Passwords
- Application download
- Data Encryption
- CL to IL if employee leaves firm
- What to do with returned/lost device
 - Wipe whole device vs. Wipe enterprise data

- **Driving**

Expense Limitations

Some financial expenses of the Firm issued mobile device will be the responsibility of the Firm however; the employee will be responsible for some portions of their monthly mobile expense.

Rate Plans, Equipment & Accessories

The Firm will be assigning each line of service to a sharing plan. This will provide a bucket of minutes to be shared amongst all employees that are assigned a Firm issued mobile device. General rate plans and equipment fees will be absorbed by the Firm. However, employees may be held responsible for covering the cost of a replacement device when a Firm issued mobile device assigned to an employee is lost, stolen or damaged more than once within a rolling two-year period.

Each mobile device will be issued a compatible hands-free headset (Ear Bud or Bluetooth), car charger and extra wall charger. Should an employee wish to purchase any additional accessories, they can do so by going to their local retail carrier store to purchase at the employee's own expense.

Device Upgrades

All firm issued mobile devices are ordered under a 2 year contract with both carriers. It is the responsibility of the employee to maintain the health of the device during the 2 year contract. If during the 1st year of the contract the device is not functioning at 100% and it is determined the device needs to be replaced, the employee will be provided a "Warranty Replacement" of the same device. If during the 2nd year of the contract the device is not functioning at 100% and it is determined the device needs to be replaced, it is the financial responsibility of the employee. If after the 2nd year of the contract the device is not functioning at 100% and it is determined that the device needs to be replaced, the Firm will replace the device and the financial responsibility of that expense will be the Firm's.

Any expense passed on to the employee will be passed through their individual personal account and must be reimbursed to the Firm according to that Policy.

Features & Usage Charges

The Firm will not be financial responsibility for any features or usage charges (Text Messaging, Insurance, GPS, 411, Long Distance, Roaming, etc.). All fees associated with, but not limited to the above mentioned, will be the financial responsibility of employee through their individual personal account and must be reimbursed to the Firm according to that Policy. The employee will have the ability to recover those charges through the Client Expense reporting process. Detailed billing will be provided monthly to any employee who makes the request.

Camera Feature

Taking and storing inappropriate photographs/images is prohibited pursuant to the Firm's use of Internet and E-mail policy. Employees are responsible for familiarizing themselves with and following any additional department-specific restrictions that may apply.

When determining the policy on the expense and usage of the device there are some key areas that you'll need to take into consideration:

- **Is personal usage allowed?**
- **Will the firm absorb 100% of the expense?**
- **Features/Usage**

- If expense will be distributed, how?
 - Cost Center/Employee Number/Personal Expense Coding
- Will the employee be responsible for recovering charges from client?
 - Long Distance/Roaming
 - Text Messaging
 - Other
- Will the firm need special reporting?
 - Cost Center/Manager
 - End User Invoicing