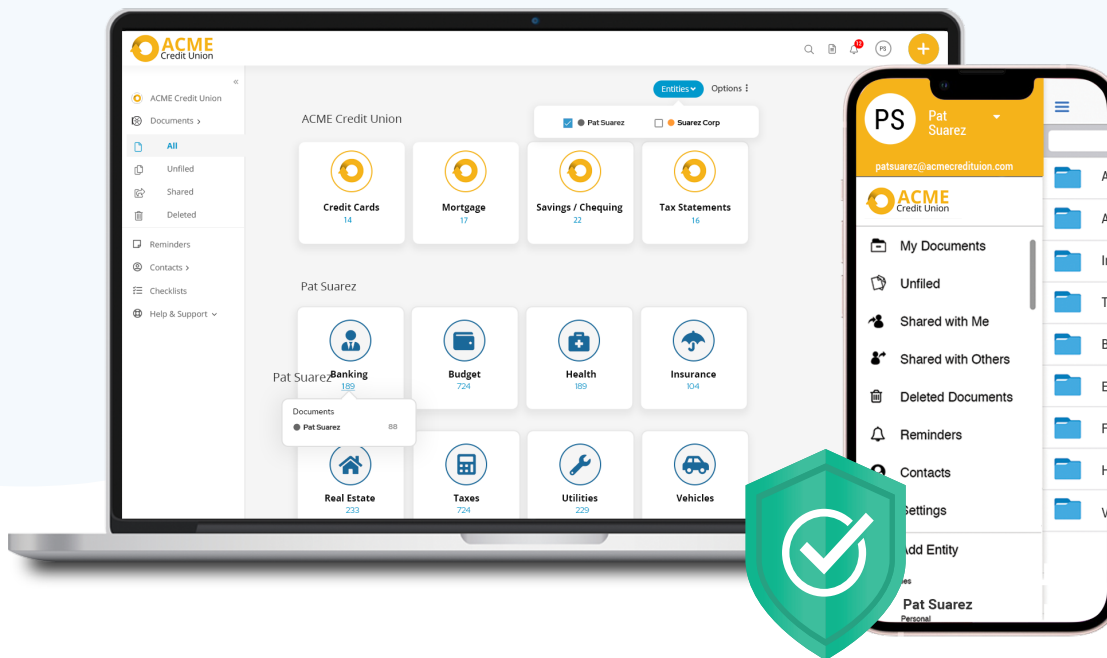


Secure Digital Vault Technology Built for Credit Unions of the Future

Deliver a white-label Digital Vault Platform that empowers your credit union members to store, organize, manage, and share personal and business documents in one secure and convenient location. Seamlessly connect your lines of business to your members and transform your document and information-driven processes, today.



Bringing Massive Value to Your Back Office and Front Office While Changing the Paradigm and Value Proposition for Your Credit Union Members.



Built on Open APIs

Seamlessly connect and integrate critical data and document-driven workflows via FutureVault's Open APIs.



Best-in-Class Security

AWS Secure Data Centre, PCI DSS, and SOC 2 Type II compliance to protect your institution, lines of business, and your members.



Connected Workflow

Our multi-tier platform connects all stakeholders and levels of your institution (Head Office, Lines of Business, Front Office, & Members).

Optimize Your Enterprise Value Proposition



Streamline Document Workflows

eSignature workflows, Customized Checklists, Secure Bulk Uploads, & Trusted Collaborator Permissions, will help save you and your customers significant time and money.



Integration into eSignature Workflows

Using any eSignature protocol, FutureVault's patent-pending technology automatically creates new Vaults (and folders) while automatically delivering documents securely to your members.



Customized Checklists

Easily customize and create checklists of key documents required from members across your lines of business (loans, mortgages, insurance, etc.). All checklist activity is secure and uploaded documents are automatically filed in specific folder locations of choosing.



Trusted Collaborator Permissions

FutureVault's patented permissioning model provides Trusted Advisors (internal and external collaborators) with secure access to discrete elements of the Vault (a file, a folder, or an entire section).



Compliance Activity Trails

All actions within the platform are recorded with a full, real-time audit trail.



White-Labeled Web & Mobile Apps

Extend loyalty, trust, and authority across your Credit Union and with members by providing white-labeled web and mobile apps. *FutureVault can easily integrate into existing platforms*



Multi-Language Support

FutureVault supports multiple languages for you and your members (English, French, Spanish). *More languages available upon request.*



Wave Goodbye to Paper

FutureVault's cloud-based, paperless document exchange and workflow tools add to your ESG Compliance.

Optimize Your Member Value Proposition



Security & Peace of Mind

Show your members just how much you care about them and their families by safeguarding their most important information and documents in one convenient location.



Personal Life Management Vault™

Your customers' *Personal Life Management Vault™* affords them the opportunity to confidently store, manage, and access all personal, business, and financial documents.



Customizable Folder Taxonomy

Use FutureVault's well-thought-out folder taxonomies or easily customize and create unique personal folder structures to manage documents.



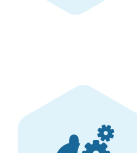
Multiple Entity Filtering

Sophisticated filtering makes it easy to segment and organize documents across multiple people, businesses, and properties.



Customized Checklisting

Members can easily assign checklist items for required documentation to their network of Trusted Advisors (i.e. insurance agents, real estate lawyers, accountants, etc.) saving them considerable time and effort.



Automated Intelligent Reminders

FutureVault makes it easy to automate reminders for simple things like renewing a Mortgage, Insurance Policy, Passport, and more.

Wealth Professional Canada recently named FutureVault as a 5-Star WealthTech Provider in its 2022 report. (Wealth Professional Canada, Sept 2022)



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