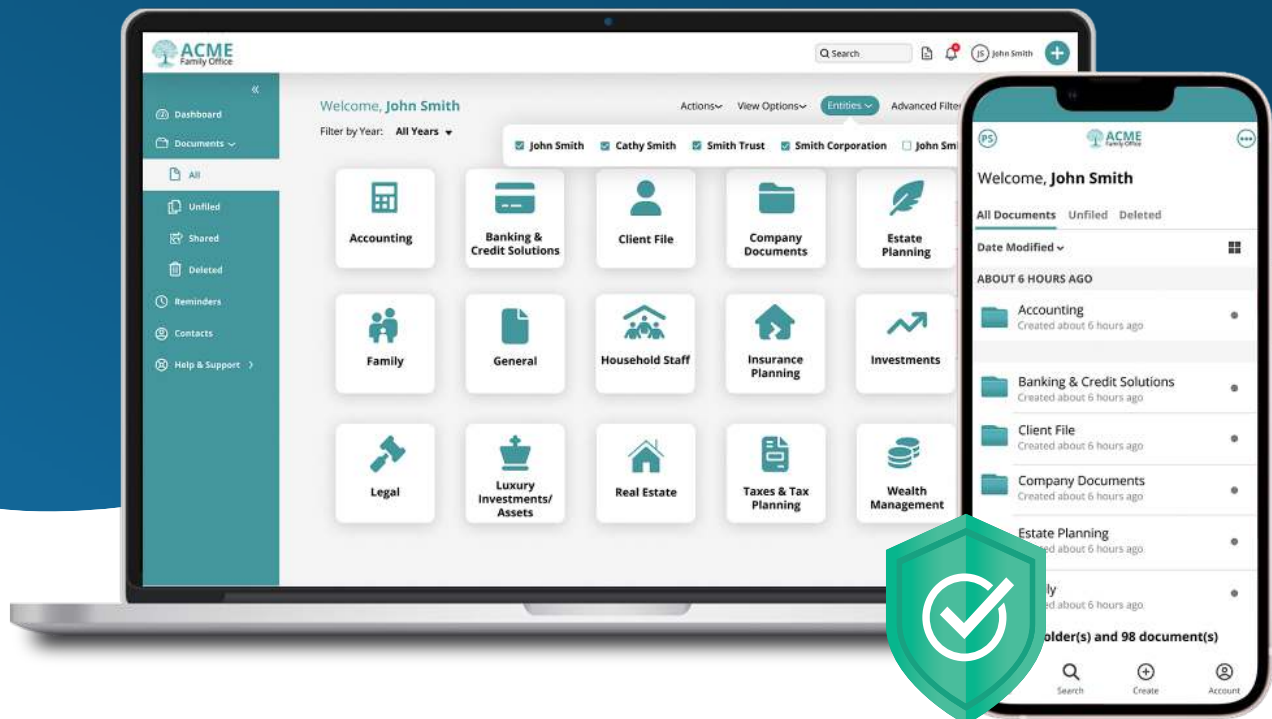


# Secure Digital Vault Technology for Modern Family Offices

Bringing Massive Value to Family Offices by Changing the Paradigm of Document Management with the *Personal Life Management Vault™*.

FutureVault's best-in-class Digital Vault Platform helps High Net Worth Families protect, access, store, and manage important documents, data & information in one bank-grade secure location across multiple entities, geographies, and generations.



Equip your Family Office with a white-labeled platform to securely deposit all documentation related to the family, home, properties, businesses, and finances, making it the single source of truth.



## Best-in-Class Security

AWS Secure Data Center, PCI DSS, and SOC 2 Type II compliance to protect and safeguard the Family's information assets.



## Increased Collaboration

FutureVault securely connects all the stakeholders (family members, employees, accountants, lawyers, insurance agents, etc.)



## Seamless Integration

Modern platform affords unlimited API integrations. For example, Family Offices can use Yodlee to bring in statements from Financial Institutions.

# Optimizing the Value Proposition for Single Family Offices



*"Our Family Office uses FutureVault's technology for secure, digital central storage with access by Trusted Advisors and users from anywhere in the world. FutureVault has allowed us to easily digitize important paper documents, making every bit of it secured, accessible, and searchable"*

## Steve Kangas

President & Managing Director,  
Hunter Holdings Family Office



### Streamline Document Workflows

Using FutureVault's Folder Taxonomy, Ingestion Email and Trusted Advisor Permissions, Families and Family Offices will save time and money.



### Customizable Folders & Folder Taxonomy

Choose to use one of FutureVault's well thought out folder taxonomies or easily customize, create and assign unique personal folder structures to manage their project-related documentation such as invoices, pre-sales, legal documents, development charges, etc.



### Ingestion Email

Unique and secure ingestion email for each Vault Holder allows documents (and email correspondence) to be directly forwarded into the Family Office Vault (ex, john@smithfamilyvault.com).



### Fiduciary Compliance Trail

All actions within the platform are recorded with a full audit trail.



### Proprietary Features

FutureVault's Granted Patents:

1. Trusted Advisor Permissions
2. Multiple Entity Filtering
3. AI-Smart Filing



### Trusted Advisor (Collaborator) Permissions

FutureVault's patented permissioning capabilities affords Trusted Advisors (i.e accountants, real estate agents, life insurance agents, lawyers, etc.) access into discrete elements of the Vault (a file, a folder, or an entire section).



### Multiple Entity Filtering

Sophisticated filtering makes it easy to segment and organize documents across multiple Family Members, Corporations, Trusts, etc and offers Vault holders the ability to transfer the Vault to their children.



### AI Smart Filing

Using Optical Character Recognition (OCR) to identify the type of document uploaded, the Vault will suggest where to file it. This allows full text search throughout all documents and images, freeing up valuable time.



### Automated Intelligent Reminders

FutureVault makes it easy to automate reminders for simple things like submission of periodic financial statements, renewing government identification, etc.



### Go Paperless

Usage of FutureVault's platform reduces carbon footprint and allows Family Offices to embrace ESG.



### Iron Mountain Digitization as a Service (DaaS)

Family Offices can digitize their entire historical paper trail via the FutureVault and Iron Mountain partnership. Iron Mountain will digitize the documents and automatically deposit them right into their Vault.



### Multi-Language Support

Multi-language platform support for you and your clients (English, French, Spanish). Languages available upon request.

**BOOK A DEMO**

[connect@futurevaultinc.com](mailto:connect@futurevaultinc.com) | [www.futurevault.com](http://www.futurevault.com)

