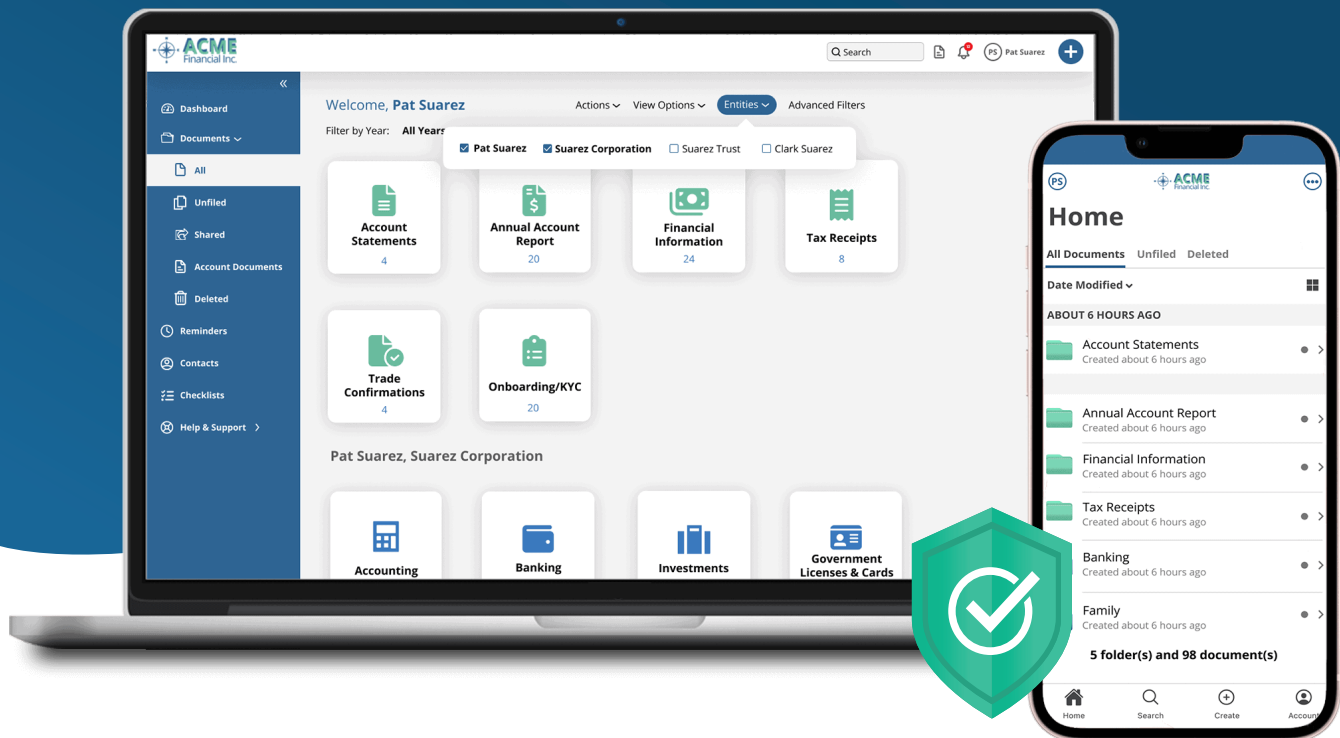


Secure Digital Vault Technology Built for Firms of the Future.

FutureVault's white-label Digital Vault Platform makes it easier than ever for your clients to store, organize, manage, and share personal and business documents in one convenient location. Connect and collaborate with clients in a secure, SEC- and FINRA-compliant environment.



Save 30% in Back-Office, Compliance, & Admin Costs While Improving the Digital Client Experience



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 enterprise and your clients.



Multi-Tiered Platform

Connect the workflow across all stakeholders and levels of your institution (Back Office, Front Office, & Clients).

Optimizing the Value Proposition for **Your Firm**



Automate Document Delivery

Automatically deliver multi-custodial documents and other critical documents to clients and across your organization in bulk, securely.



Integrated eSignature Workflows

Automatically create new client Vaults (or folders) and deposit any and all signed documents into specific folder locations upon eSignature completion.



Customized Checklists

Easily customize and create checklists of key documents required to securely collect documents from clients and their Trusted Advisors (onboarding, financial planning, wealth planning, etc).



Trusted Collaborator Permissions

Patent-supported permissioning model provides Trusted Advisors with secure access to specific areas of the Vault.



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 organization and with members by providing white-labeled web and mobile apps. *FutureVault can easily integrate into existing platforms.*



Multi-Language Support

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



Paperless Processes

Usage of FutureVault's platform empowers firms and their advisors to go paperless, adding to ESG Compliance.

Optimizing the Value Proposition for **Your Clients**



Security & Peace of Mind

Show your clients you care by safeguarding their most important information and documents.



Personal Life Management Vault™

A Personal Life Management Vault™ means your clients can confidently store, manage, and access 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.



Secure Document Exchanges

Securely collaborate, share, upload, and exchange documents with advisors and Trusted Collaborators.



Automated Intelligent Reminders

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

"FutureVault provides our Back Office and Advisors with the tools and intelligence to streamline mission critical business processes and improve the robustness of compliance regimes."

Christopher Enright
President & Managing Director,
Aligned Capital Partners
(CI Financial)

