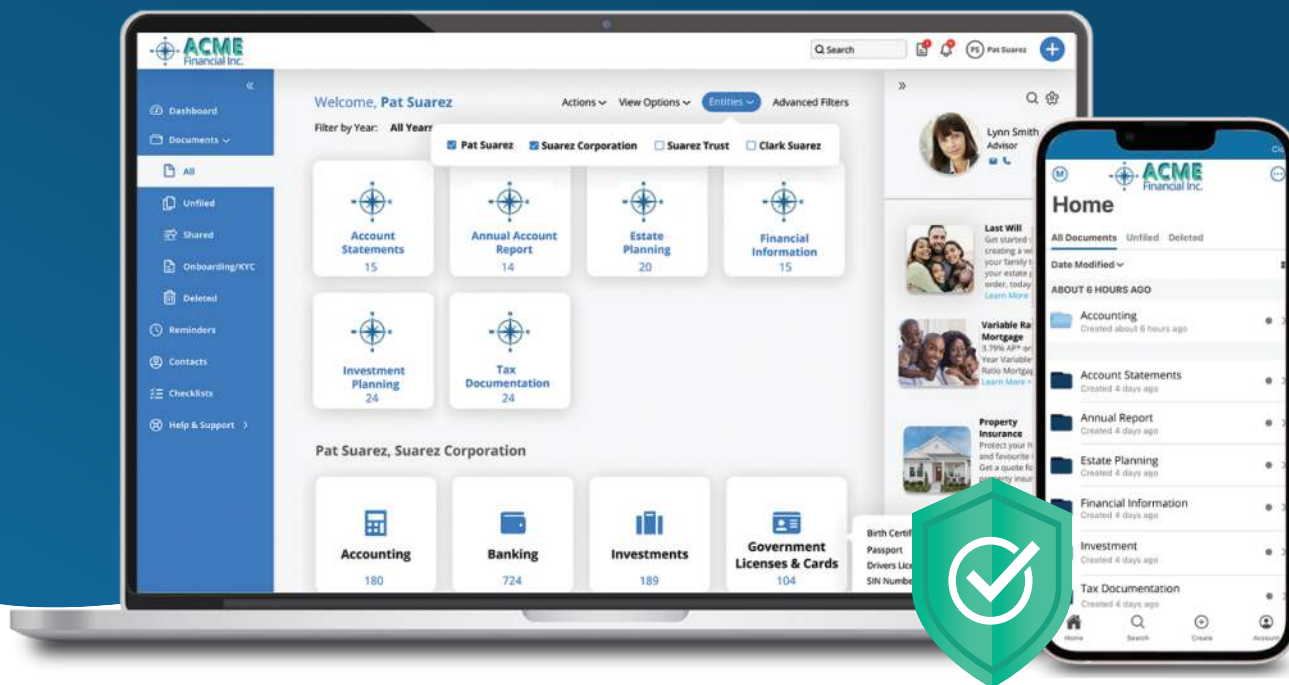


# What Happens in the **Vault**, Stays in the **Vault**.

FutureVault's best-in-class security and compliance allows you to access, manage & share important information and documents with confidence and peace of mind.



## Purpose-built solutions to **protect and safeguard** enterprise and client data

At FutureVault, we believe that information is the ultimate asset class, which is why we incorporate the best security and privacy standards to keep your most important corporate and client information assets safe and secure.



### Compliance That Matters

FutureVault proudly maintains PCI DSS and SOC 2 Type II compliance to safeguard enterprise and client data.



### Bank-Grade Security

Encryption in transit and at rest using Symmetric 256-bit AES and Asymmetric 2048-bit TLS.



### Continuous Monitoring

Continuous vulnerability scanning, penetration testing, patch management, access attestations & security monitoring & reviews.

# Security and compliance features to protect you and your clients **every step of the way.**

*"Today's wealth management firms require solid cybersecurity implementation to grow and prosper. As the essence of a wealth firm's brand is client trust and confidence, wealth management organizations now rely on formal cybersecurity policies and procedures, with direct executive managerial oversight, to ensure that client data is safe and secure."*

**Nevin Markwart, CFA, CFP**

Chief Information Security Officer, FutureVault Inc.



## Multi-Factor Authentication

Multi-factor authentication is an extra layer of security designed to ensure that you're the only person who can access your account.



## Compliance Activity Trails

Advanced activity tracking logs all user and Trusted Advisor workflows that occur within your account, providing you with a real-time audit trail.



## User Only Access

Only you and those you grant trusted collaborator permissions to can access and view your information.



## No Local Files

No documents are stored on your local computer, so there is no risk of losing data from a hard drive failure or computer theft.

## DR<sup>4</sup> is What We're Here for

Our proprietary DR<sup>4</sup> Framework is just one of the many ways FutureVault ensures that enterprise and client information and documents are safe, secure, and adhere to your regulatory requirements.



## Document Retention

We maintain historic copies of corporate, professional, and client data and documents to meet regulatory retention requirements.



## Data Residency

Your data is encrypted and backed up in different regions, ensuring your data residency requirements are met.



## Disaster Recovery

Our backup and disaster recovery plan meets stringent requirements to prevent data loss and interruption.



## Data Redundancy

In addition to constant backups, documents are replicated and converted into PDFs once ingested into the platform, with the original document being maintained.



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