



# Welcome to FutureVault!

You've been designated as a  
Trusted Advisor.



## What is FutureVault?

FutureVault is a Digital Collaborative Vault that makes it easy for your clients to securely store, organize and share personal, financial and legal information that is most valuable to them, their family and their business. Your client has granted you access to their vault as a Trusted Advisor.

## What is a Trusted Advisor?

As Trusted Advisor you now have access to specific documents and information as permitted by your client. All information is stored securely and intelligently in an encrypted private cloud-based vault, which makes sharing and collaboration fast and efficient.

## What Can You Do as a Trusted Advisor?

As a Trusted Advisor you can view, upload and download documents, set reminders for important documents and create folders and contacts. All activities will be recorded in the History tab. You cannot permanently delete folders or documents, create entities or assign other Trusted Advisors.

## How to Set Up Your Account

Now that you have received your invitation, please complete the following steps:

1. Click "Accept Invitation"
2. Fill out the required fields on the sign-up page
3. Sign into your new account and add your mobile number for Two-Factor Authentication
4. Set up your security questions

## Questions?

[Click here to visit Help & Support](#)