Get Started with **FutureVault**

A Simple Guide for VaultHolders

V06-2020

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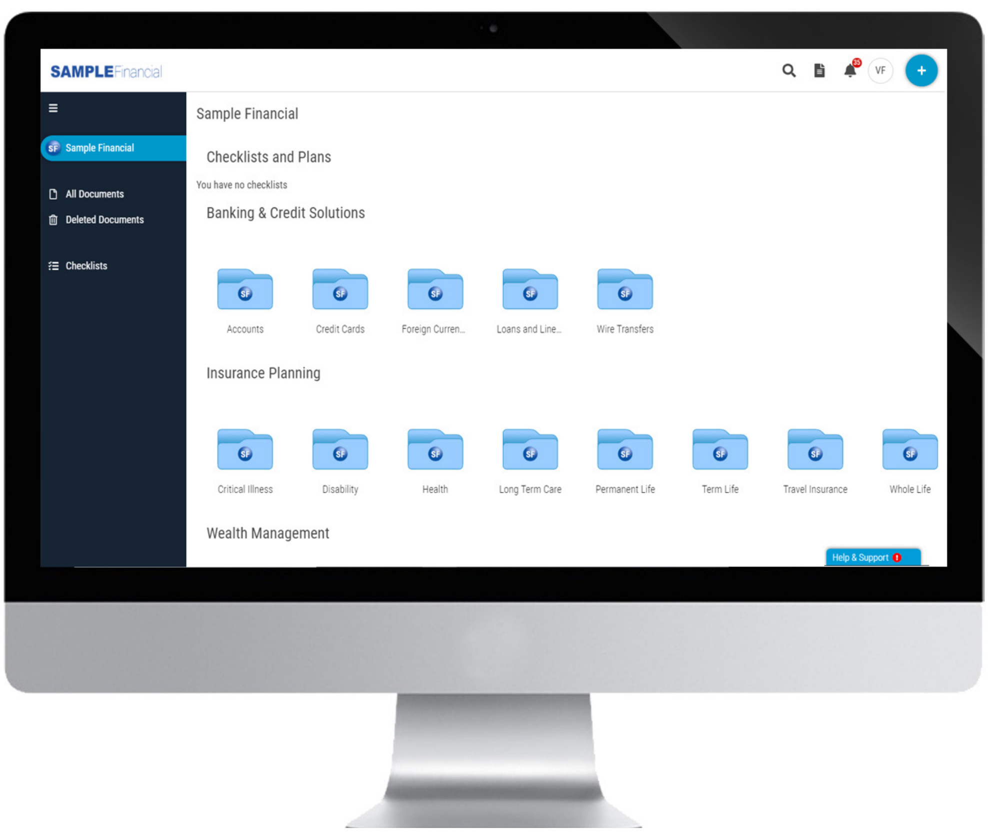
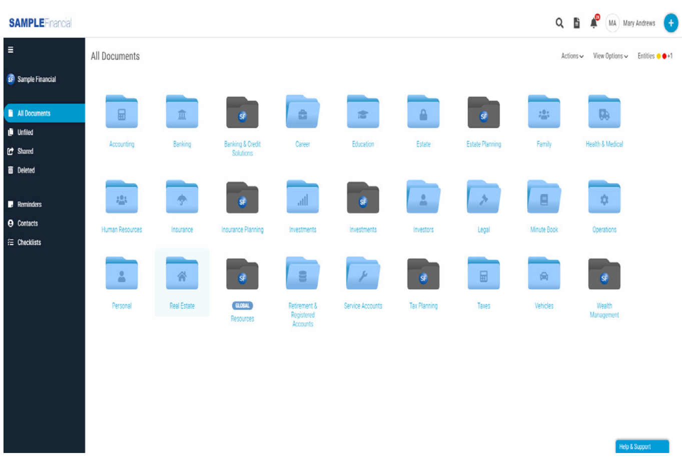


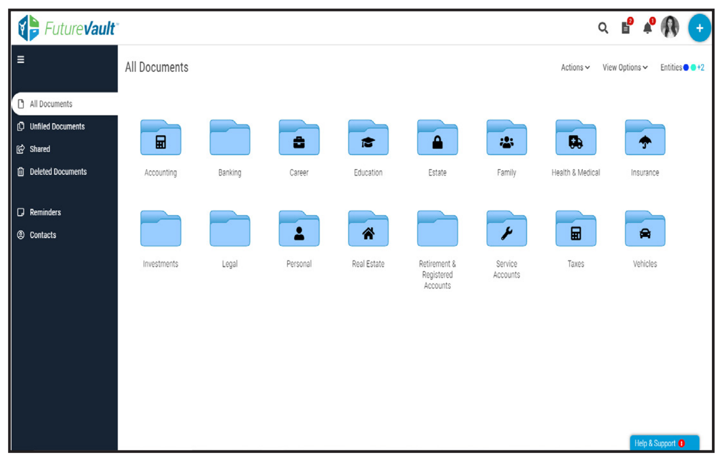
HI THERE!

We're so excited that you've joined us!

Now that you have your own Digital Collaborative Vault, you can rest easy knowing that your most important personal, financial and legal information are secure, organized and easily accessible, now and forever.

Let's discover your new Vault!





If your Vault was provided to you by a Sponsor, you wll see a Company tab in your left menu. In this section, you will find customized documents and information that your Sponsor has selected to share with you. Any document in this section can be viewed and downloaded by you or your Sponsor. Under the "All Documents" tab, you will see your personal & business folders, if you have been provided this package. Only you have access to these folders unless you give permission to a contact. Your sponsor folders will also be there but with a different colour or with a specific icon for easy identification.

In some cases, you may only have your personal & business section. Only you have access to these folders unless you give permission to a contact. You are able to create reminders, add notes, share folders and documents and check the history of any activity related to a document.

01. Getting Familiar with your Vault

To ensure you start off on the right foot, we want to help you better understand the general terminology we use to talk about your Vault.

Vault: An account where you (the VaultHolder) will store, organize and share information with your family, Trusted Advisors and Sponsors.

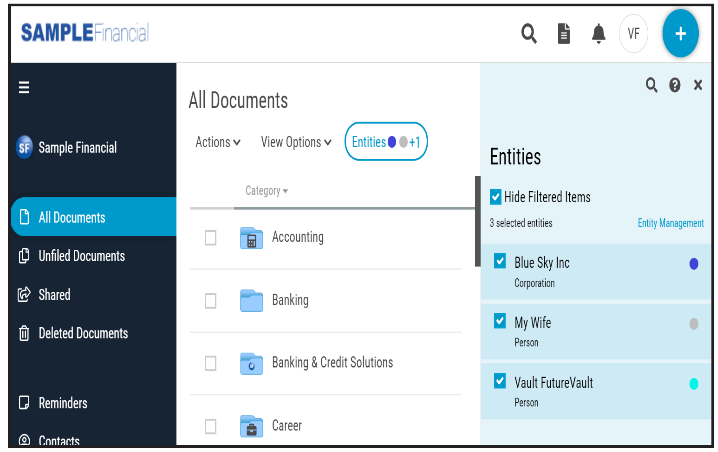


Image 1

Entity: A self-contained separate Vault (within the Vault) that allows for independent or combined dynamic views, collaboration and ownership (Image 1). The number of Entities available in your account will depend on your package. You can add more Entities for an additional cost. There are 10 types of Entities with pre-defined taxonomy.

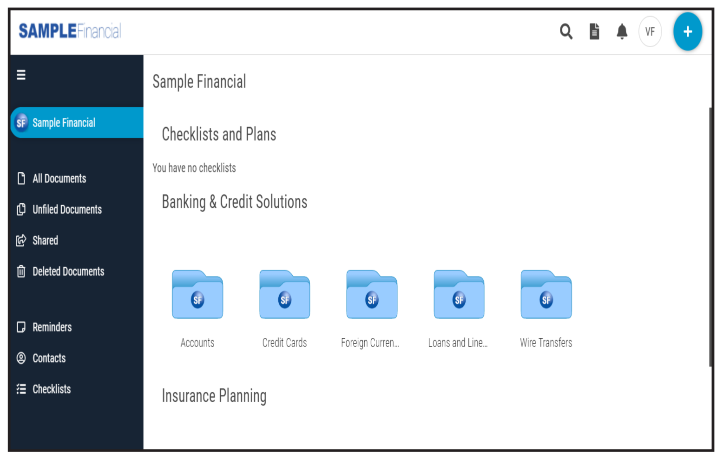


Image 2

Document Architecture (Taxonomy): Combination of folders defined and organized in the platform by categories and sub-categories. You will find a taxonomy related to your sponsor, and or a personal & business taxonomy available. (Image 3)

Company Taxonomy: You can find it on the top left menu under the Copany tab. This section contains a customized taxonomy where your sponsor can file documents and interact with you in different ways. (Image 2). **Please note** this will only appear if the vault was provided by a Sponsor

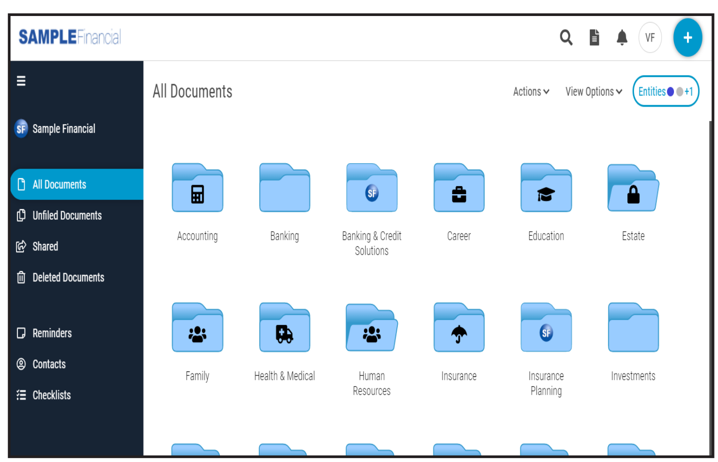


Image 3

Personal & Business Taxonomy: Private folders that contain a pre-defined structure, where you can keep your personal & business documents organized, and share it with your family or other Trusted Advisors. These folders are located in the "All Documents" tab located in your left menu. These folders are also dynamic with relation to the Entities. (Image 3)

Categories (Level 1): Pre-defined main folders that are named by topic, i.e. Accounting, Banking, Careers, Health & Medical, etc. You cannot create these folders or add any document directly to them.

Sub-categories (Level 2): Pre-defined sub-folders that are related to the main category. You can file documents or create folders within them. However, you cannot create these type of folders.

Folders (Level 3 or more): Can be created by any user under a sub-category.

Inbound Email: A unique email address created by the system for each Vault that allows individuals to send documents directly to a Vault. You can find this email under your “Unfiled Document” tab. (Image 4)

Permissioning: Granting access to a specific document, category or Entity. When an individual has access to any section of your Vault, they can Add/Edit/Share/Delete any document that is filed in the area they have access.

Document History (Audit Trail): A list of all activities performed by each user related to a specific document. (Image 5)

OCR (Optical Character Recognition): The recognition of printed or written text characters by the system. This feature helps categorize information and makes suggestions on where to file documents. It also optimizes the search for documents and contacts.

Search: An OCR based functionality to find any document in your Vault, even if it is in your “Unfiled Document” tab. You can search for contacts, folder names, document names or a specific word in a document.

Share: A feature to share documents with anyone. The person will receive an email with an encrypted link to view and download the document if they need it. You can also set an expiration date on their access.

Reminders: Create reminders for yourself or other contacts concerning a specific document or event.

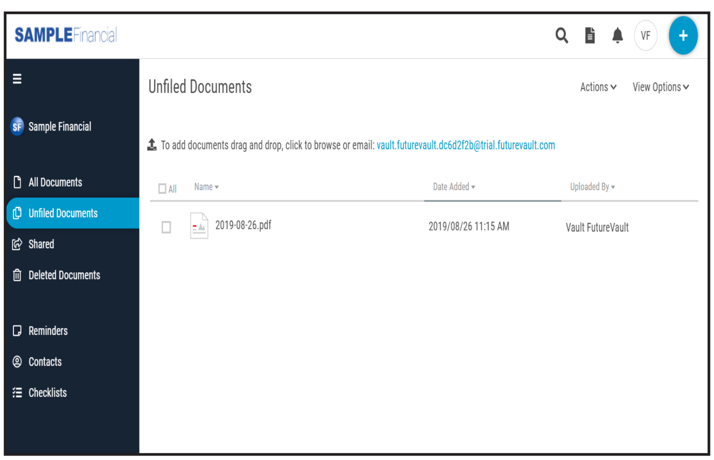


Image 4

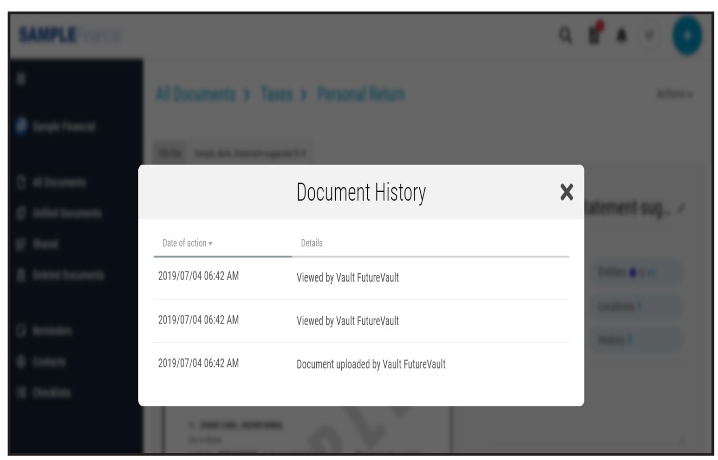


Image 5

02. Managing Entities

- By default, you have one Entity set as Personal.
- The Entity feature allows you to file documents as if you have individual filing cabinets.
- We suggest creating different Entities for your spouse, children and business. The document structure changes depending on the type of entity you choose.
- You can check off which Entities you would like to be visible.

2.1 Creating Entities

A. Go to your "All Documents" tab. In the top right menu click on "Entities" (Image 1).

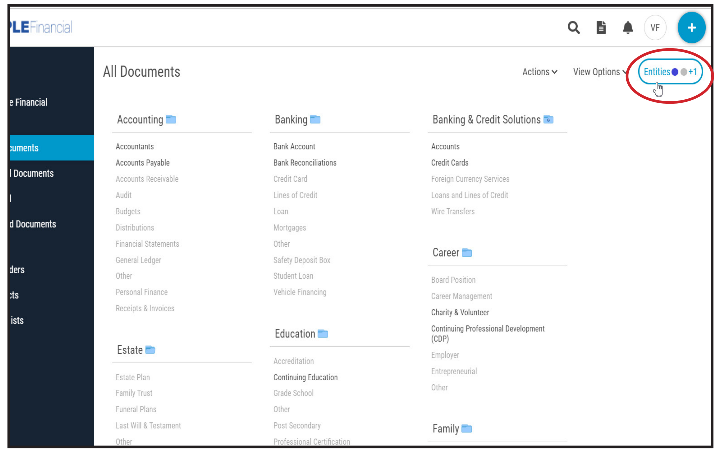


Image 1

B. A new menu will be displayed. Click on "Entity Management". (Image 2)

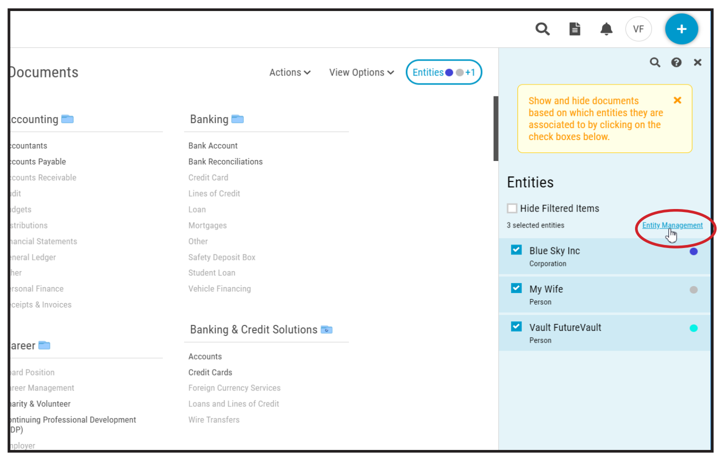


Image 2

C. Click the "+ Add New Entity." (Image 3)

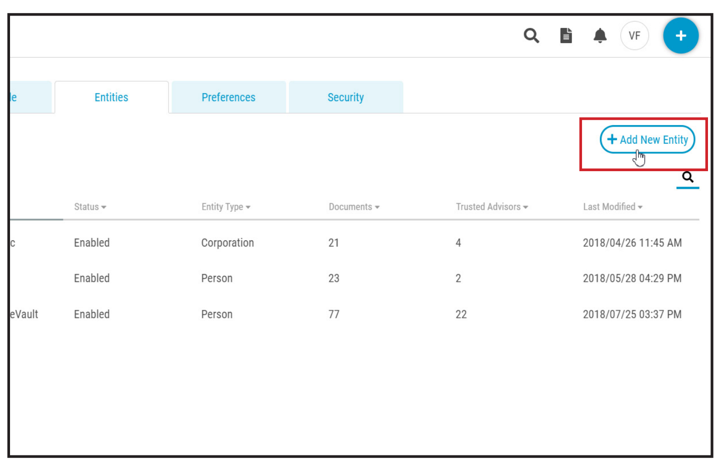


Image 3

D. Add a name to your new Entity and select the Entity Type (Sole Proprietorship, Limited Liability Corporation, Person, Partnership, Corporation, Cooperative, Charitable Foundation, Family Trust, etc.) and choose a colour. You can also fill in the information in the Entity summary form. Click "Save".

2.2 Editing Entities

You can change your default Entity type from Personal to any other available options, or edit any information in your Entity Summary form at any time. You will need to:

A. Click on your initials in the top right-hand corner of the screen, and select "Account Settings".

B. Select the "Entities" tab.

C. Click on the Entity you want to update.

D. Click on "Entity Type" to display the drop-down menu. Select the new type. **Please note** that if you change your Entity type, you may lose all information already set up in your Entity Summary forms. You can also edit any field or the colour associated with the Entity. After you finish, click "Save".

03. Uploading Documents

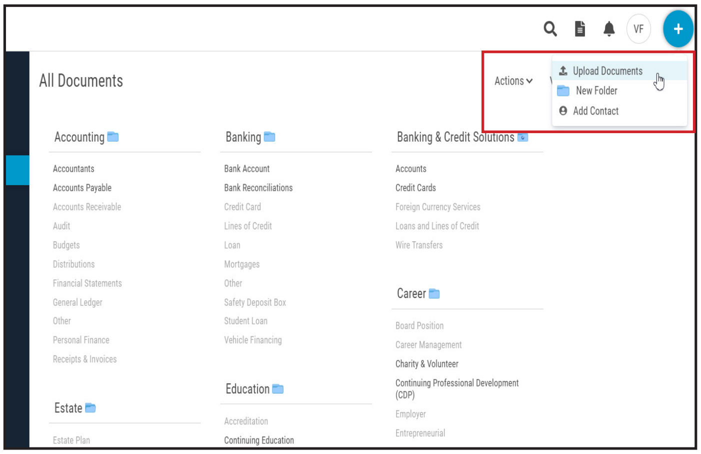


Image 1

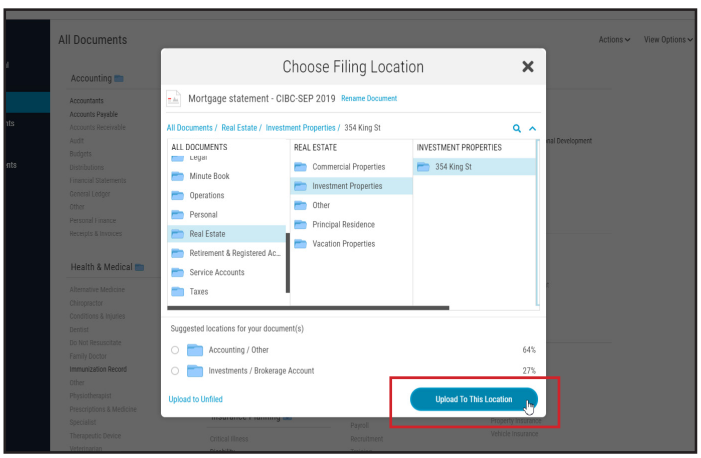


Image 2

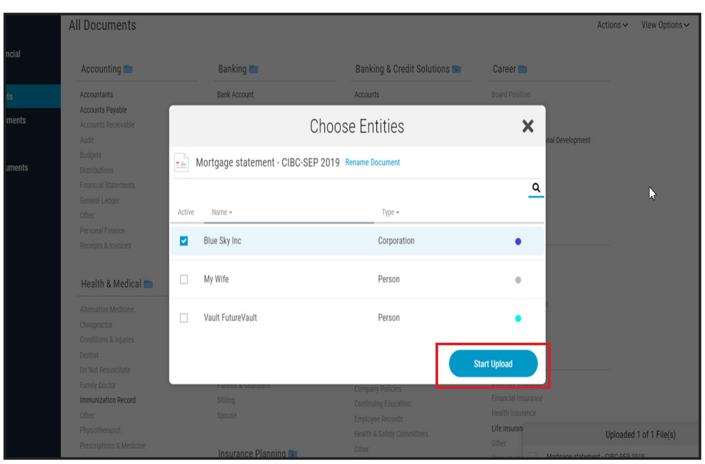


Image 3

3.1 Upload Button

- You can get documents into your Vault by clicking the “+” button on the top right of the screen. Click “Upload Documents”. Search for the document on your computer and click “Open”.
- Select the category and sub-category where you would like to save your document, pick the location our system suggests, or you can send it to your “Unfiled Documents section to file it later. Click on “Upload to this location.”
- Choose the Entity you want to assign this document to and click “Start Upload”.

You can also go to the location you prefer and drag and drop all the documents you want to upload. Then, choose the Entity you want to assign this document to and click “Start Upload”.

3.2 Inbound Email

- You have a personal inbound email address that allows you to send documents directly to your Vault. You can find it in “Unfiled Documents” tab.
- Share this email with your Trusted Advisors and family or simply add your inbound email address to your scanner’s pre-set email addresses for faster upload.
- Further, all documents emailed into your Vault will appear in your “Unfiled Documents” tab.

The first time you received documents from any email, you will need to recognize it as a trusted sender. Once you trust this sender you will be able to file any document from this sender. Just follow the next steps:

1. Click on the email address.
2. A pop-up will ask you if you want to trust this sender. Click “Yes (Trust)”.

To save one document just right-click on it and select the Action “Move to My Documents”. Then, select the location and choose the Entity and click “Move”. You can move multiple files to one location by selecting all the files you need, click in the Action button in the right-top are and select “Move to My Documents”.

3.3 Uploading to the 'Unfiled' Area

You can also upload documents directly to the "Unfiled" area.

"Drag & Drop" document(s) onto this area to upload them. If the files were successfully uploaded, a green notification section will appear, if not, an orange notification section will display an error message. (Image 1)

File a single document: First right-click on the document you want to file. Click on "Move to My Documents" button. A pop-up will ask you to confirm that you trust that email address. To continue click "Yes". (Image 2)

File multiple documents: Select all the documents you want to file or click "Select All". Then, go to Actions, select the option to "Move to My Documents". (Image 3)

3.4 Drag & Drop / Suggested Documents

You can also Drag & Drop documents into the vault by following the same steps as above in different areas of the vault (All Documents Tab, a Sub-Category, etc.). You can also use the Suggested Documents panel to upload and tag an item.

To use the Suggested Documents feature, ensure you are within a Sub-Category folder. From there select the 'Suggested Documents' button in the top right corner. You can either browser your computer files by clicking one of the documents or you can drag a document onto the type of document you are uploading. (Image 4). You can also select multiple files at one time and drag them into a location.

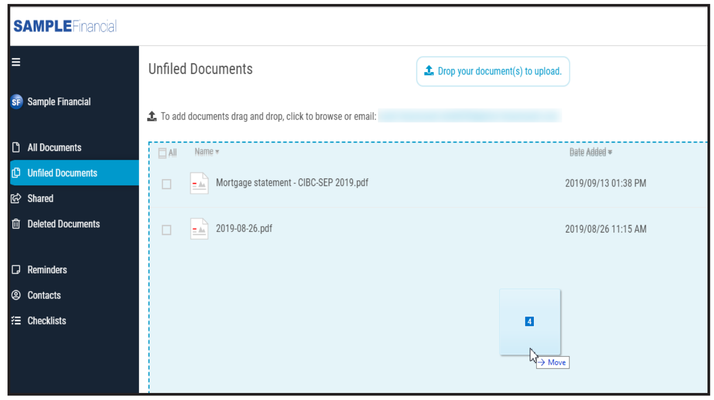


Image 1

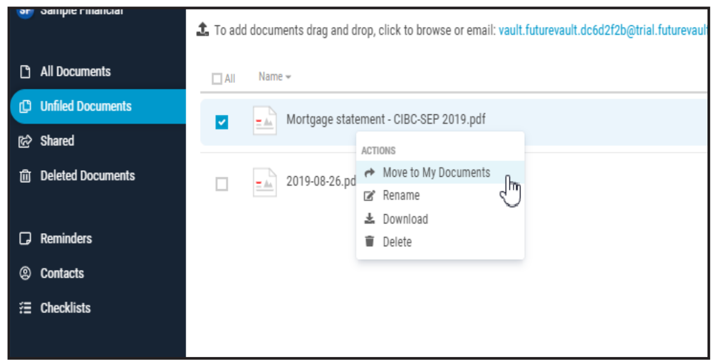


Image 2

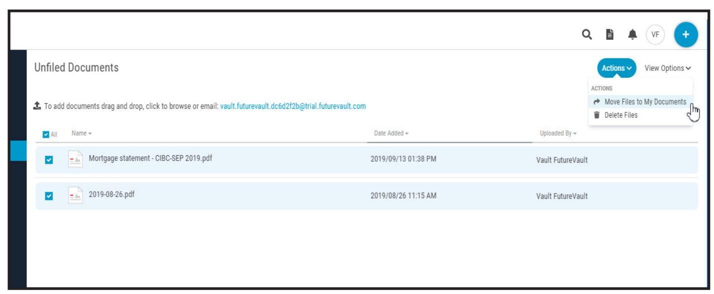


Image 3

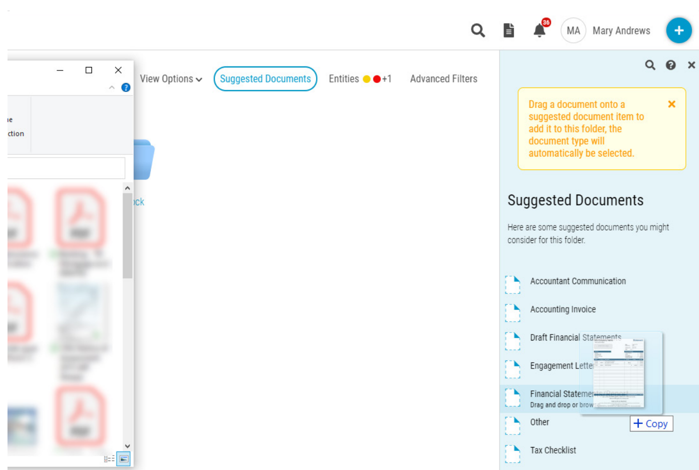


Image 4

04. Creating Folders

4.1 How to Create Folders

- Click on the "+" button in the top-right menu, select "New Folder". (Image 1)
- Type the name of the folder.
- Select the location for this folder and click "Create". (Image 2)

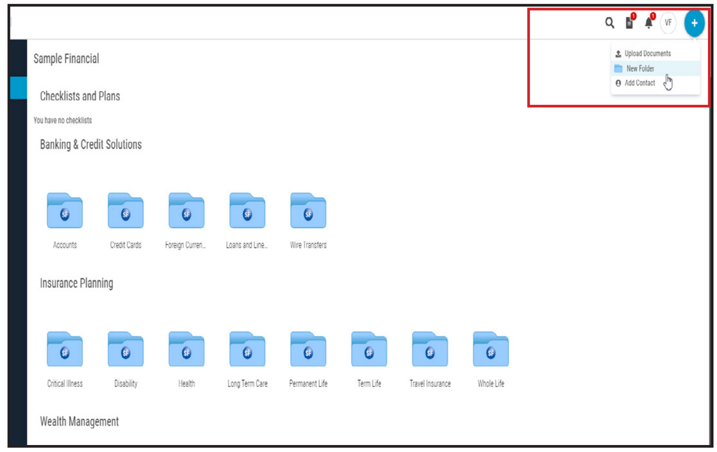


Image 1

4.2 Creating Folders When Uploading Files

When you are uploading a document, you need to find the location where to file it.

1. Select the category, then the sub-category, clicking on "+ New Folder". (Image 3)
2. Add a name to the folder and click "Create". Please note that to finish to filing the document under this new folder you need to select it once is created.

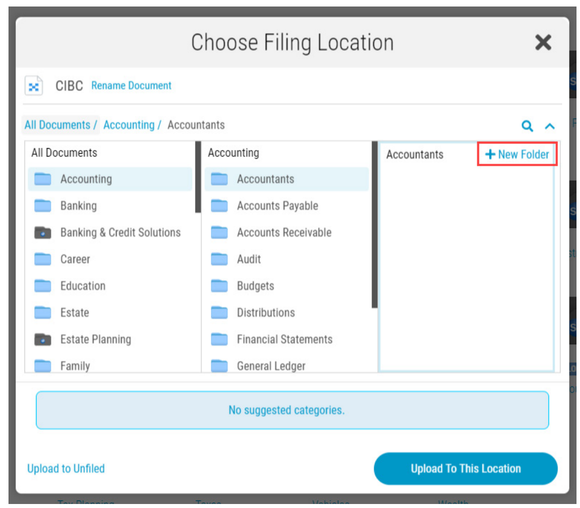


Image 2

4.3 Creating Folders When Moving or Adding a Document to Another Location

When the directory box is displayed, select the sub-category you want to create the new folder, and click on "+ New Folder", add a name and click "Create".

Please note that to finish to move or add the document your need to click on this new folder once is created, if not it will be moved or added to the sub-category.

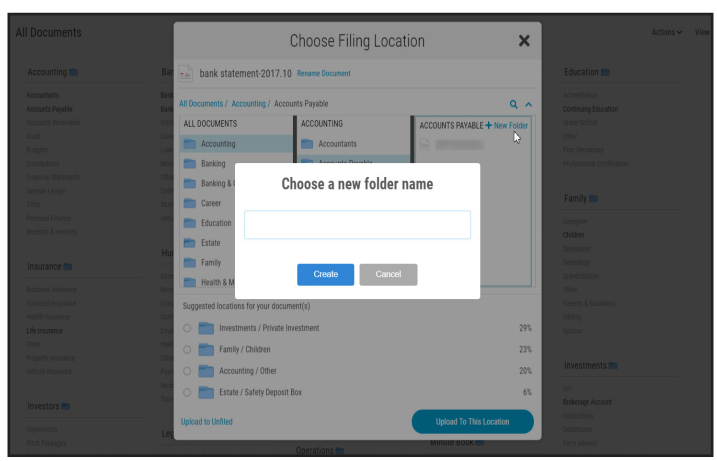


Image 3

05. Adding Documents to Multiple Locations

5.1 Multiple Locations / Tagging

This feature allows a document to appear in multiple folders, but the document is stored only once.

- In the document view, click the button "Location" displayed next to the document. (Image 1)
- Click on "Add New Location". (Image 2)
- Select the other location in the directory or choose one of the suggested locations. (Image 3)
- Click "Add". You will see the pop-up location window with the summary of where this document can be located.

Once you add the document to a new location you will see an increase in the number under the location button. You can manage the location of the document by clicking again in the "Location" button. You can remove any location by clicking on the "x" next to the folder name, but you will need to have at least one location.

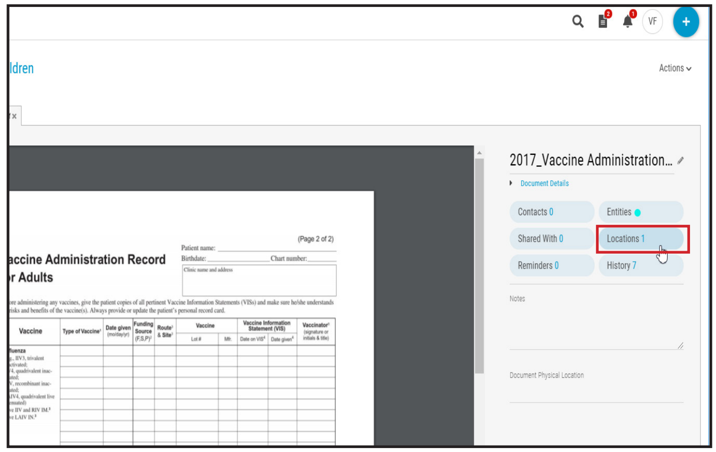


Image 1

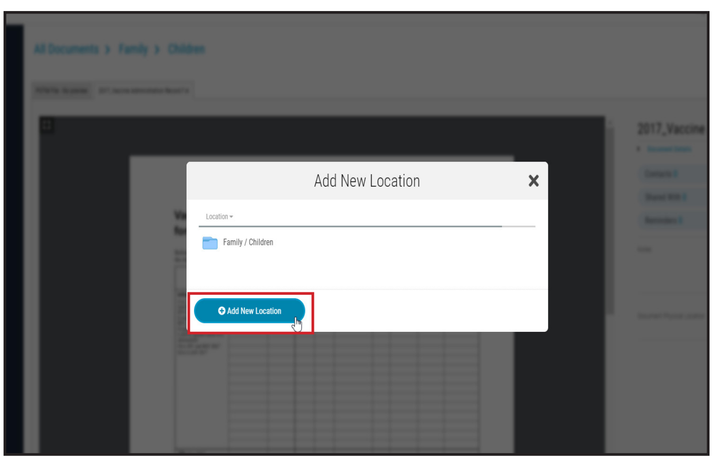


Image 2

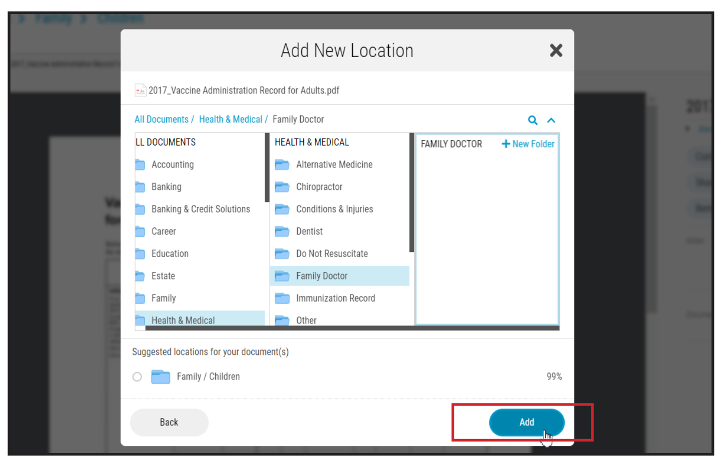


Image 3

06. How to Create a Contact

You can add contacts from different places in your Vault. You can set reminders, share documents or assign these contacts as one of your Trusted Advisors.

6.1 Contact tab

You can manage your contact in this area. Here, you can add a contact manually or import it by uploading a .vcf file (vCard).

Add New Contact:

- Click on the "+" button in the top-right menu, select "New Contact". (Image 1)
- Add mandatory fields: First Name, Last Name and Email.
- Click "Create". (Image 2)

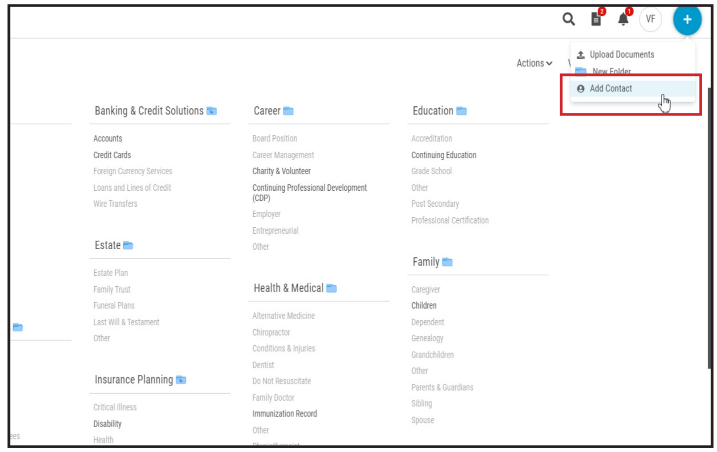


Image 1

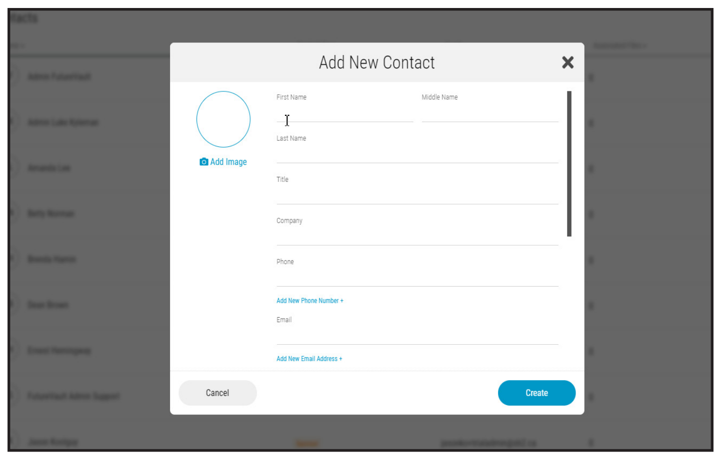


Image 2

Import Contact Card:

- To import a contact, click on "Import Contact Card" on the top right corner. (Image 3)
- Locate the vCard file in your computer and click "Open".

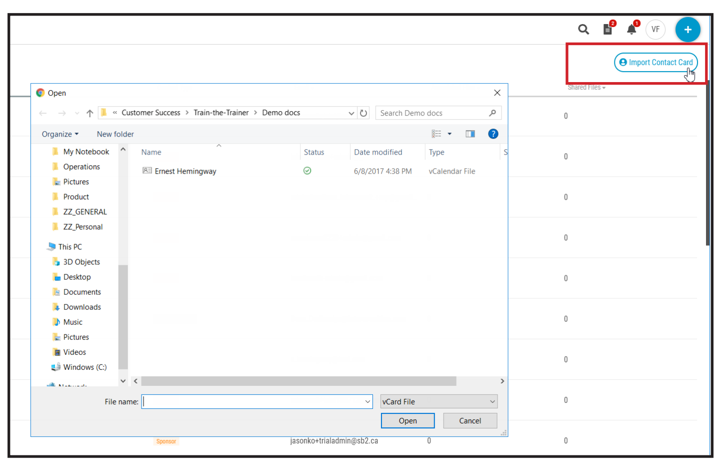


Image 3

6.2 Inbound Email

If a vCard is sent to your Vault using the inbound email, the system will automatically add it to your Contact list.

Click "Accept" to save the vCard in your Contacts list, or "Remove" if you don't want this contact in your Vault.

07. Assigning Trusted Advisors

7.1 Trusted Advisors / Managers

Assign a contact as a Trusted Advisor to have them collaborate in areas of your Vault that you choose. They will log in acting on your behalf, having some of the functionality you have, but restricted to the areas you allow them to see.

All Trusted Advisor's actions are recorded in the "History" tab of each document. Trusted Advisors cannot delete folders, permanently delete documents, create or delete Entities or other Trusted Advisors.

If you would like to give a contact full access to your vault (the same permissions as you, the VaultHolder), select "Manager Access" under Step 1: General Permissions.

To add one of your contacts as a Trusted Advisor follows the next steps:

1. Go to "Contacts" and select the name of a contact you want to make a Trusted Advisor.
2. Click on "Edit Permissions". In the pop-up window: (Image Permissions)
    - If need it, select need to check their General Permissions.
    - Second, select what Entity or Entities they will have access too.
    - Third, select the categories and sub-categories in that Entity you want them to access. (Image 2)
3. Then click "Save." You can choose if you want to send the invitation email now or later. Remember, you will need to send this invitation for your Trusted Advisor to gain access to your Vault. Once, your contact receives the invitation email they will have to set up their login and password.

In your main Contact list, you can identify your Trusted Advisor under the header "Contact Type" with a light blue box. If your Vault was provided by a sponsor, you will see their contact marked in an orange box with the label "Sponsor"; these type of contact only have access to the sponsor taxonomy.(Image 3)

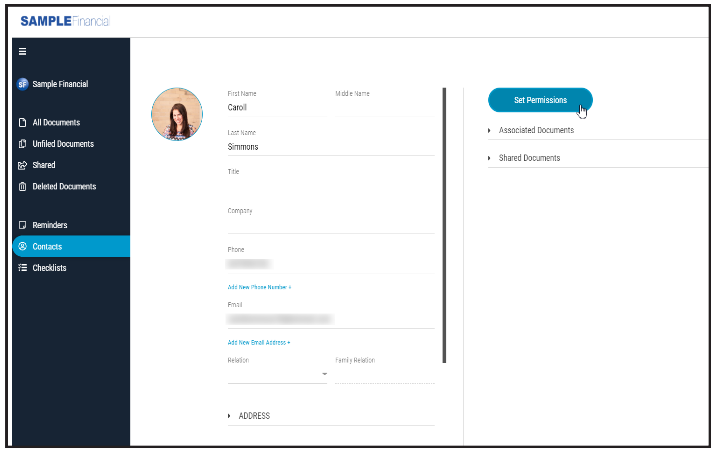


Image 1

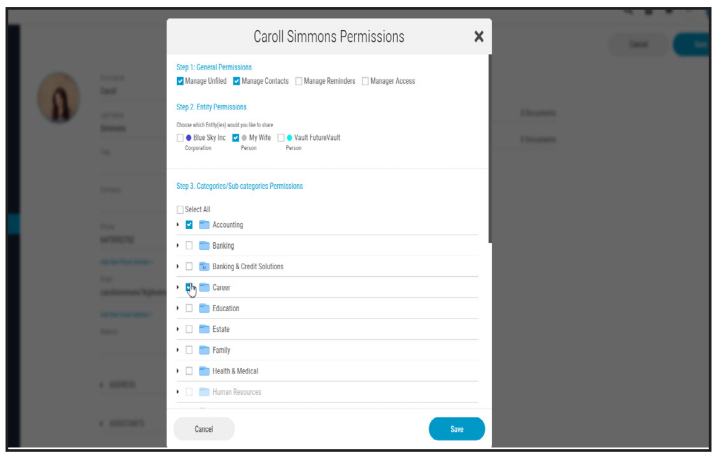


Image 2

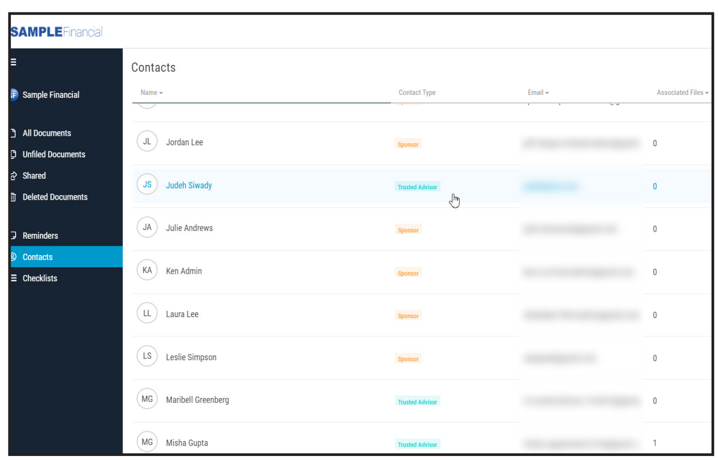


Image 3

08. How to Share a Document or Folder

8.1 Sharing

You can share your documents with your contacts, or you can send a link to another email not saved in your contact list.

Sharing a Document:

1. Right-click on the document you want to share.
2. On the "Actions" menu, select "Share". (Image 1)
3. Add the name or email of the person you want to share the document with. Select the name or email. You can share the document with more than one person at a time.
4. A pre-define subject and message will be displayed. You can customize it if you wish. (Image 2)
5. You can add an expiration date, meaning that after the specified date, your contact will no longer be able to view the file. If you don't add an expiration date, the link will be active until you manually remove it. To add a date, select "Yes" and calendar will open, then select the desired expiration date.

You can remove their access at any time, by clicking on the "Share With" button next to the document view. Click on the "X" next to the name.

Sharing a Folder:

You can share a Level 1 (Category) or a Level 2 (Sub-category) folder with any contact in your list. To do this, you must give them Trusted Advisor access. Follow these steps:

1. Click on "View Options", and select "Icon View" or "List View".
2. Right-click on the folder you want to share. (Image 3)
3. Select the contact you want to share it.
4. Manage the permission you want give. Choose at least one option in Step 1, and at least one Entity in Step 2.
5. Click "Save". If this is the first time you are setting up this contact as a Trusted Advisor, please click on "Send" in the Trusted Advisor Notification window.

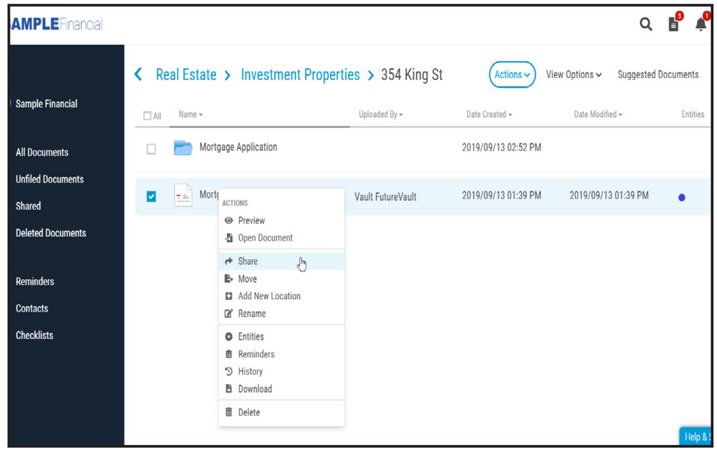
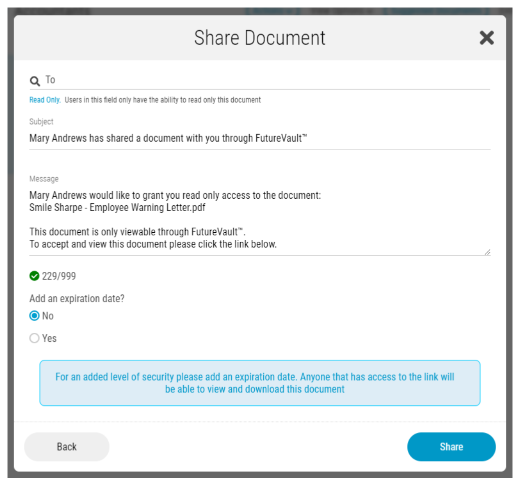


Image 1



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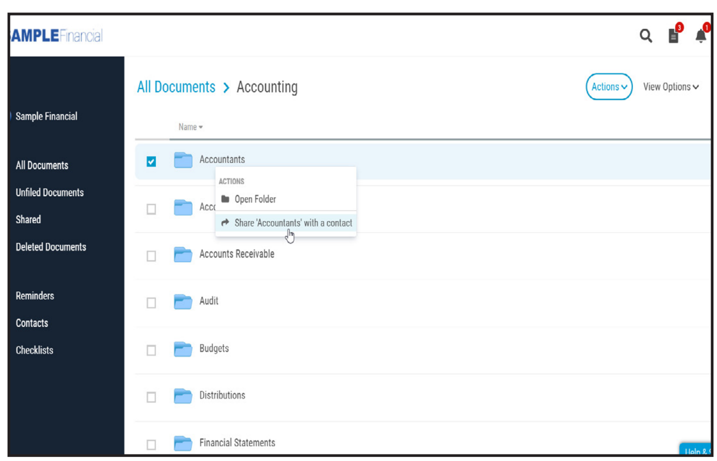


Image 3

09. How to Set a Reminder

9.1 Reminders

This feature allows you to set a reminder for yourself and others which will be delivered by email. All reminders are attached to a specific document, and you can add more than one person to the same reminder.

1. Right-click on the document you want to create a reminder. Select "Reminders" in the Actions list. (Image 1)
2. Add the subject and body of the message for the reminder notification email.
3. Select an Event date. (i.e. Expiration date of your passport).
4. Click on "+ Remind Another Contact", if you want to send the same reminder to another contact. Select the contact that you want to send this reminder to and when you want to remind them (days, weeks or months before the event date). (Image 2)
5. Click on "Add Reminder".

You can preview all of your reminders and see all contacts associated with each reminder in the "Reminder" tab located on the left menu. If you want to review the reminder details, double click on the reminder itself. All of the contacts added to the reminder will receive an email notification. (Image 3)

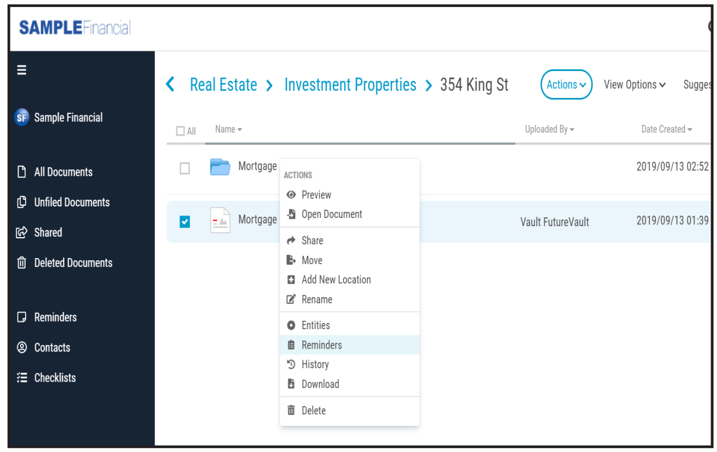


Image 1

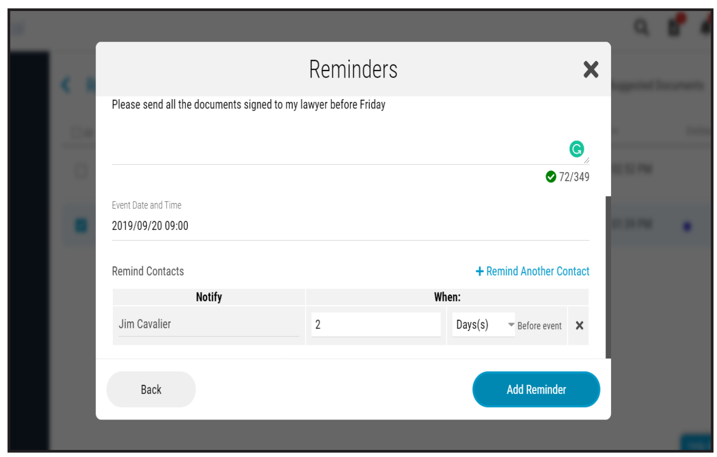


Image 2

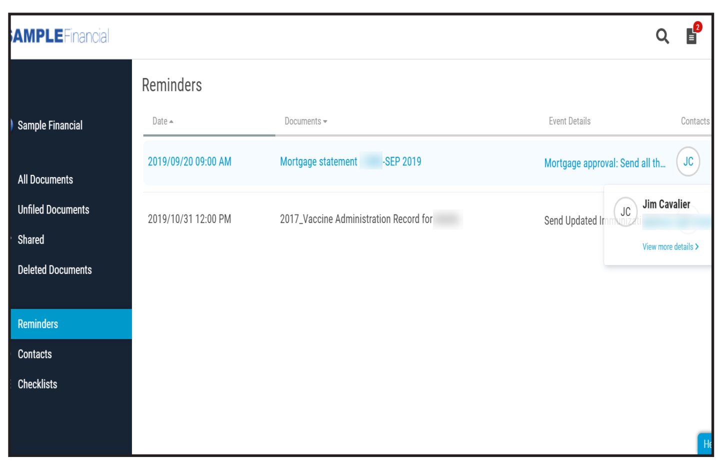


Image 3

10. Viewing Document History

10.1 Document History

You can see all of the actions done by any of your contact related to a specific document, providing a full audit trail.

A. To view a document's history, right-click on the document and select the "History" from the Actions list; or open the document and click on the History button next to the document view.

B. In this section, you will see which Trusted Advisor has edited, viewed, shared, downloaded, moved or accessed your document in any way. (Image 1)

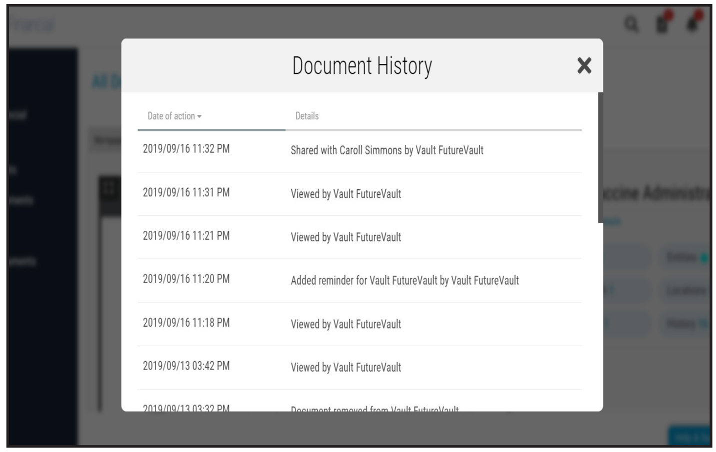


Image 1

11. Security

To manage your security settings click on your name in the top right corner, select "Account Settings" (Image 2), and click on the Security tab. You can change your primary email, change your password, activate or deactivate the two-factor authentication, manage your trusted emails and security questions in this section.

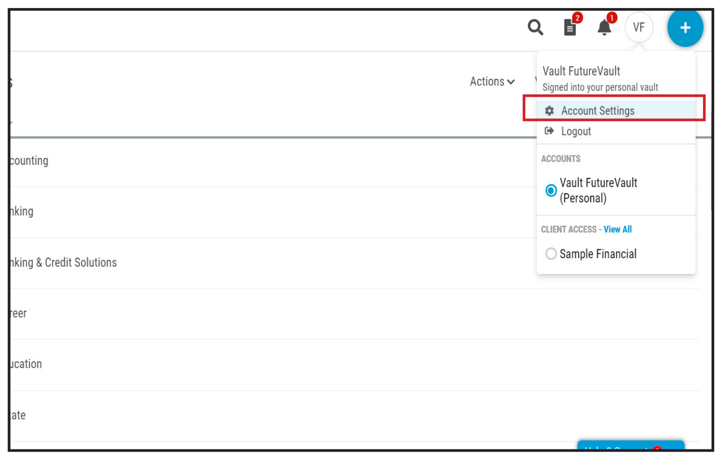


Image 2

11.1 Change your Primary Email

Type your current login email, next type the new email, and re-typed to confirm. Click "Save" and add your current password. We will send you an email with 4-digit PIN to verify your new email address. Add the PIN number and click "OK". (Image 3)

11.2 Change your Password

Type your current password, then enter the new password and re-type it to confirm. Click "Save". A green note will let you know that your password was successfully reset. (Image 3)

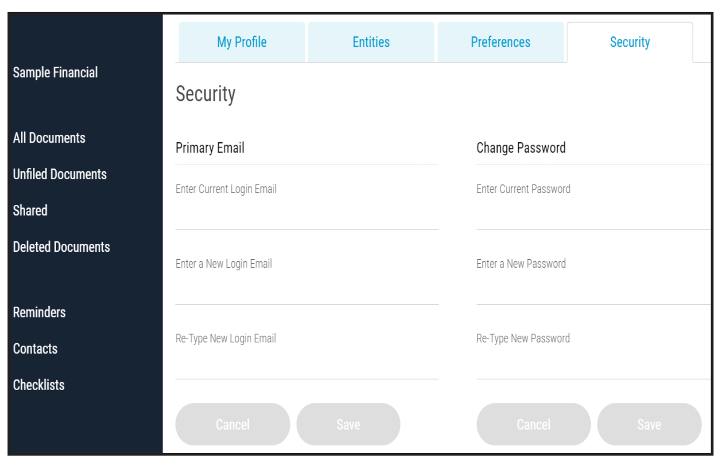


Image 3

11.3 Manage your Two-Factor Authentication

You can activate your Two-Factor Authentication by adding a mobile number. You will receive a text message with a 4-digit PIN to confirm your number.

Once you enable this security feature, logging in to your Vault will require you to enter a unique verification code sent via text message (SMS) to the mobile number you registered, in addition to your username and password. Every time that you sign in, we will send you a new code.

You can deactivate your Two-Factor Authentication at any time, click the “x” button and enter your password to confirm this action.

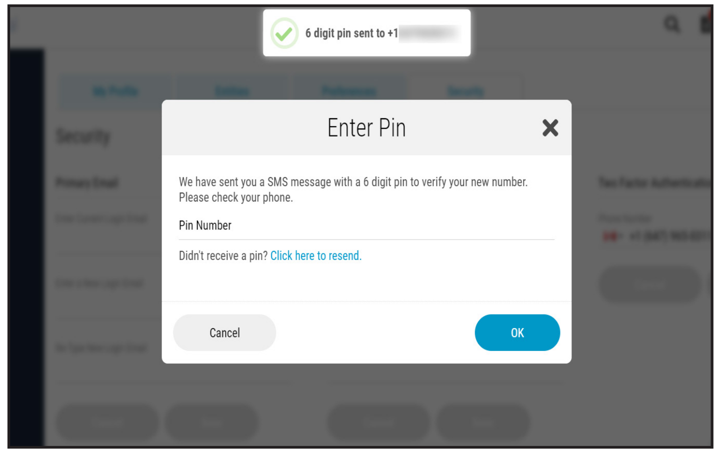
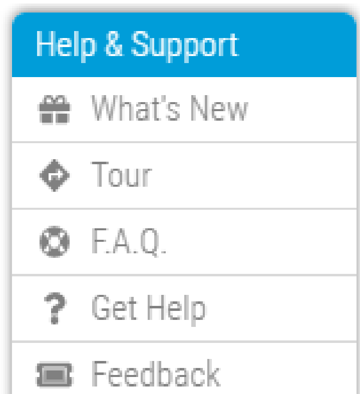


Image 4

12. Help & Support

Inside all vaults, all users have an area where they can find links to get training videos, news about latest updates, and technical support help. It’s located on the rigth-bottom corner.



1. What’s New: a place where you can learn about the new and improved features our platform, either look at the summary or explore in detail by going to the full post.
2. Tour: quick videos that shows you the new improvements and features available for users.
3. FAQ (Frequently Ask Questions): Access our 24/7 Online Help Center, where you can find quick answers on how to use the platform.
4. Get Help: A direct link to contact the First line of Customer Support Team for extra help.
5. Feedback: We want to hear what all the users think about the platform. Send us an email today and help us make FutureVault better.

Administrators or your Customer Support Team can call us at +1 844-538-2858 from Monday to Friday from 9:00 am to 5:00 pm (EST) or send us an email to our support ticket system to support@futurevaultinc.com.