

GenerationalVault



THE VAULT: PRESERVING THE PAST AND SECURING A FUTURE

NET WORTH SUMMARY

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FINANCIAL REPORTS

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SYNCED ACCOUNTS

.....

DOCUMENT STORAGE

.....

APPOINTMENT MANAGEMENT

.....

RETIREMENT EDUCATION

I remember my grandfather taking me with him to the bank when he wanted to review a legal document that was in his safe deposit box. As a child, it was an impressive process – but it certainly seemed to take a long time. There were multiple keys involved, signatures and an escort to a private room.

Once the safe deposit box was opened, my grandfather shuffled through a number of documents, making stacks on the table until he found what he was looking for. When he found the information, he had to copy it into a notebook by hand. And at one point, he pulled out a copy of an insurance policy he forgot was in the safe deposit box.

After leaving the bank, we went to meet with my grandfather's attorney and financial professional. At the meeting, he realized he forgot an additional investment account that was required to complete the transaction. He had to go back to the bank the next day, repeat the ceremony of the safe deposit box, retrieve the necessary information, and then schedule another meeting with his attorney and financial professional.

We have truly come a long way. Today, you may still keep a safe deposit box, but you never have to go to the bank for document storage. When you partner with our company, you receive access to Generational Vault, a secure online portal that allows you to easily organize, manage, and access your financial life.

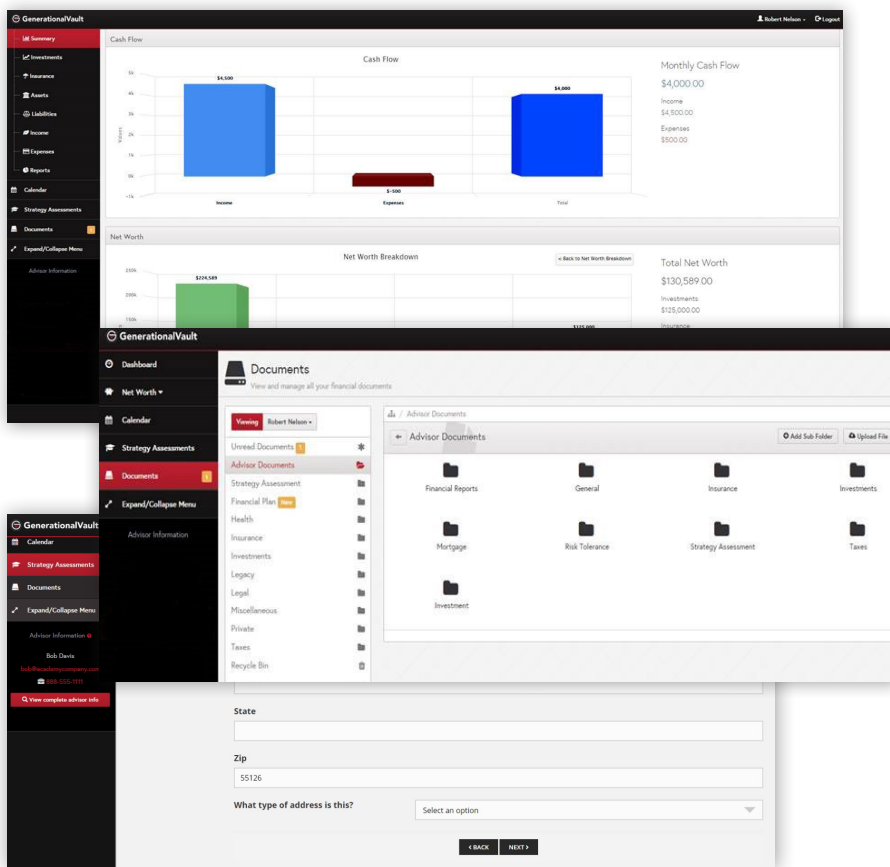
This secure online portal allows you to upload important documents and view your financial information. Every time you log into Generational Vault, you have immediate access to detailed financial information. You can view a snapshot of your financial picture, a simple-to-understand summary of all your financial accounts, detailed records of your assets, important financial reports and dynamic charts. Watch how your investments are progressing, and manage your expenses and income from one, central location. Generational Vault keeps a running record of our work together, so you'll always know where to look if you want to review a decision or check on the progress of your plan.

Generational Vault helps to ensure that all of your important information will be safe, secure and

accessible anytime, anywhere. All data is secured with a SSL Certificate that uses a 2048-bit public encryption key, one of the strongest available, to help protect your financial life.

And since you might not be the only person who needs access to the information in your Generational Vault, you can manage your Generational Vault data authorizations so that your loved ones will be able to access your financial and legal information when it matters the most.

You have worked hard to provide the best possible life for those around you. Now, you can organize the resources and experiences you have accumulated to make a lasting impression on those you love and the causes in which you believe.



NET WORTH SUMMARY

Monitor your net worth and receive daily account value updates using Generational Vault.

FINANCIAL REPORTS

Initiate the Color of Money Risk Analysis tool and proprietary Strategy Assessments and access retirement planning reports through Generational Vault.

SYNCED ACCOUNTS

Sync all your financial accounts and benefit from a consolidated view of your assets in Generational Vault.

DOCUMENT STORAGE

Store important financial and legal documents and share your remembrances by uploading pictures, videos, and other important keepsakes in Generational Vault.

APPOINTMENT MANAGEMENT

Schedule an appointment using our online appointment scheduler and receive important financial messages through Generational Vault.

RETIREMENT EDUCATION

Benefit from the interactive and educational guides available to you through Generational Vault.



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