

FutureVault Successfully Granted US Patent for Document Sharing and Collaboration with Trusted Advisors

FutureVault, the industry-leading Digital Vault Platform for financial institutions and wealth management, announces that it has been granted its second patent.

TORONTO, ON, CANADA, September 16, 2021 /EINPresswire.com/ --

[FutureVault](#), an industry-leading document management and Digital

Vault Platform for financial institutions and enterprises, today announces that the U.S. Patent and Trademark Office has allowed the patent application 15/690,760 "Systems and Methods For Sharing Documents".

This invention enables FutureVault users to electronically store, share and grant collaborative document management functions to Trusted Advisors. Examples of Trusted Advisors include, but are not limited to:

- Regulatory Agencies
- Accountants/Auditors
- Lawyers
- Financial and Estate Planners
- Insurance Professionals

At the enterprise and back-office level, this technology allows firms to easily provide access to regulatory bodies, streamlining compliance and audit readiness amongst other materially value-added use cases.

At the advisor and front office level, advisors and wealth managers are afforded the ability to grant collaborative access to internal and external service providers and specialists involved in key planning activities and initiatives.

Lastly, clients of the enterprise benefit by being able to provide access to key family members,



FutureVault transforms document management workflows for modern financial services companies and professionals.

lawyers, accountants, and insurance agents, amongst others. These Trusted Advisors can view and manage personal, business, and financial documents to the benefit of all constituents.

The entire permissioning model includes a real-time audit trail of all activities by Trusted Advisors on the platform.

“We are incredibly pleased that the US Patent Office recognizes the uniqueness of the document sharing technology in our platform,” said G Scott Paterson, Co-founder and Executive Chairman at FutureVault. “This patent strengthens the differentiation of FutureVault’s offering against our competitors by providing a permission model centered around the contacts and Trusted Advisors of all constituents connected to our platform. This is especially important for our customers in wealth and other highly regulated industries where collaboration, compliance, and security all go hand in hand.”

G Scott Paterson and Michael Bradley, FutureVault Co-founders and FutureVault Principal Engineer, Jason Ko are listed as Inventors on the patent.

The successful grant of its second patent continues to position FutureVault as an industry leader in the information management, document filing, and Digital Vault space for financial services and [wealth management organizations](#) everywhere.

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For media inquiries, please contact FutureVault at press@futurevaultinc.com.

About FutureVault

FutureVault is the industry-leading Digital Vault Platform for the financial services industry that enables institutions, advisors, and clients to manage information better, together. FutureVault offers a powerful white label solution that transforms the way organizations manage, store, and deliver client documents and statements, onboard and retain clients, onboard and retain advisors, and manage compliance and audit readiness leading to significant operational efficiencies. By leveraging FutureVault’s technology, organizations save significant time and money in their day-to-day workflows.

FutureVault was founded in 2014 by G Scott Paterson and Michael Bradley and is currently led by Chief Executive Officer, John Shackleton (technology veteran and former OpenText CEO).

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