

FutureVault Named 5-Star WealthTech Provider by Wealth Professional Canada

The 5-Star WealthTech Report published by Wealth Professional Canada recognizes technology pioneers and the top solutions in the wealth management industry.

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[FutureVault](#), a pioneer of Personal Life Management Vaults™ and market-leading secure document exchange solutions was recognized earlier this morning as a 5-Star WealthTech Provider by Wealth Professional Canada.



FutureVault receives recognition as a top technology provider in the wealth management industry being named as one of 30 5-Star WealthTech Providers in Wealth Professional Canada's report.

Wealth Professional's 5-Star WealthTech Providers report recognizes technology pioneers in the wealth management industry who are shaping innovation and creating unique technology that

addresses fundamental industry-wide challenges. The report published by Wealth Professional Canada highlights the top technology firms in the industry that have successfully demonstrated their capabilities in taking technology to the next level by providing institutions, firms, advisors, and their clients with accessible and innovative solutions that break the status quo.

“
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Daniel Kenny, Chief Executive Officer at FutureVault

Wealth Professional Canada objectively assessed each entry for detailed information, leading innovation, and

proven success – along with benchmarking against the other entries – to determine the 30 named 5-Star WealthTech Providers across the below categories:

- Financial Planning Software;
- CRMs;
- Back-Office Support;

- Financial Tools/ Dashboards;
- Digital Marketing

FutureVault Chief Executive Officer, Daniel Kenny, shared a few comments regarding the future intersection of technology and wealth management, along with the company's growing recognition in the industry, "Our technology has reached a tipping point in terms of awareness in the market, and the unique benefits we can offer our clients. What exactly is a vault? Why are financial institutions now invested in our technology? The answer lies in a paradigm shift happening right now that empowers the end client and makes their critical documents and data the cornerstone of every interaction with their financial services providers."

While technology will undoubtedly play an ever-greater role in the daily lives of the modern wealth professional going forward, the platforms that improve the wealth professional's capacity while importantly enabling greater value to be delivered to the end client and their family members will continue to be the most successful.

According to FutureVault, implementing best-of-breed WealthTech solutions can drive impact and influence three critical areas which include:

- Enabling client engagement to deepen the advisor-client relationship
- Automating advisor workflow to save significant time and money
- Enhancing information security and compliance capabilities

"Technology is no longer a nice-to-have, it's an absolute must that is now deeply embedded into every critical area of modern wealth management," commented Kristian Borghesan, FutureVault CMO. "We're proud to not only gain recognition as an industry leader but to continue supporting firms by improving their ability to scale and ultimately deliver greater value to both their advisors and the households they serve."

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About FutureVault Inc.

FutureVault is the pioneer of the Personal Life Management Vault™ and is steadily recognized as a market leader in secure document exchange and [Digital Vault](#) solutions in the financial services and wealth management industries. FutureVault's innovative, multi-tiered platform enables firms, advisors, and clients/households to manage information better, together. FutureVault offers a powerful white-label solution that transforms the way organizations manage, store, and



deliver documents and statements, meet information security and compliance requirements, and drive material operational efficiencies across front, middle, and back-office functions through automated workflows and integrations. FutureVault is recognized as a top 100 most innovative global WealthTech solution provider.

Visit futurevault.com to learn more. Follow us on LinkedIn.

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