

Generational Vault



THE VAULT: PRESERVING THE PAST AND PREPARING FOR YOUR FUTURE

NET WORTH SUMMARY

You may remember going to the bank with your grandparents when they needed a document from their safe deposit box. In your eyes, it was an impressive process — though it seemed to take a long time. There were multiple keys involved, signatures and an escort to a private room.

FINANCIAL REPORTS

Once the box was opened, you probably watched them shuffle through several documents, making stacks on the table until they found what they were looking for. Then they had to copy it by hand. Maybe the safe deposit box even held family heirlooms, like great-grandma's wedding ring or the watch that a beloved uncle swore protected him when he fought in World War I.

ACCOUNT INFORMATION

After leaving, your grandparents likely went to meet with their attorney and financial professional to discuss their finances and estate. As they sorted documents, there's a good chance something was missing. So, they had to go back to the bank and repeat the process.

DOCUMENT STORAGE

Convenience, clarity and transparency

We've truly come a long way. Today, while you may keep a safe deposit box, you don't have to go to the bank for documents. 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 — for you and for your loved ones.

APPOINTMENT MANAGEMENT

RETIREMENT EDUCATION

LEGACY BUILDING

This secure online portal lets you immediately view detailed financial information. You can see a snapshot of your financial picture, a simple-to-understand summary of your financial accounts, detailed records of your assets, important financial reports and dynamic charts. From one location, you can review your assets and manage your expenses and income. 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 strategy.

A legacy for your loved ones

One reason you've worked hard to save is to provide the best possible life for your family. Generational Vault can help you to continue doing that.

You can make future asset transitions a little simpler by granting Generational Vault access to loved ones and important advisors, making it easier for them to review your financial and legal information. Plus, you can feel confident that we will be there to help your loved ones. We'll explain documents in Generational Vault, help them understand their options and facilitate any necessary changes.

We also encourage you to record a video message for your loved ones and store it in Generational Vault. You may want to clarify some of your estate planning decisions, or maybe just tell them how much they mean to you. Either way, you'll be leaving what's sure to be a treasured keepsake.

Safety and security

Generational Vault helps ensure that all your important information is safe, secure and accessible anytime, anywhere. All data is secured with an SSL Certificate that uses a 2048-bit public encryption key, one of the strongest available.

Convenience, clarity and transparency for your financial life, along with the opportunity to leave a legacy for your loved ones. All yours with a complimentary Generational Vault account.



NET WORTH SUMMARY

Monitor your finances using Generational Vault.

FINANCIAL REPORTS

Initiate the Color of Money Risk Analysis and Strategy Assessment®, and access retirement reports through Generational Vault.

ACCOUNT INFORMATION

Access a consolidated view of your account information and assets in Generational Vault.

DOCUMENT STORAGE

Upload and store important financial and legal documents 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.

LEGACY BUILDING

Build a legacy for your loved ones by saving videos, pictures and other keepsakes in Generational Vault.



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