

Trusted Family Feature List

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One platform with all the tools you need to manage meetings, workflows, sensitive information and communication.

1. Groups & Permissions

Recreate your governance structure in a digital environment. Create groups for your board, shareholders, family, committees, projects, internal staff, external advisors etc. Whatever you do, decide who gets to see it.

2. Meetings & Events

Create events, track attendance, add files and manage follow-up through our event apps.

3. Private Vaults

Securely share and store information for individual family members and restrict visibility to those specific members.

4. Document Management

Create and manage folder structures you and your team can build and rely on. Organize your information in a way that's best for you. Upload and share presentations, reports, documents and spreadsheets of any type. Each member can take private annotations.

5. Electronic Signatures

Request signatures and sign documents while maintaining the highest levels of data security.

6. Tracking & Statistics

Through in-depth statistics, the platform enables you to stay on the pulse of your community's interactions. View and track metrics on interaction: posts, likes, etc.

7. Surveys

Create simple surveys to gather feedback and inputs from your family members.

8. Family Tree

Build your own family tree, from the member directory.

9. Messaging

Let members send messages to each other, in a secure way through the platform.

10. Newsletters

Send insightful email newsletters to your different groups. Track who opens and engages with your content.

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