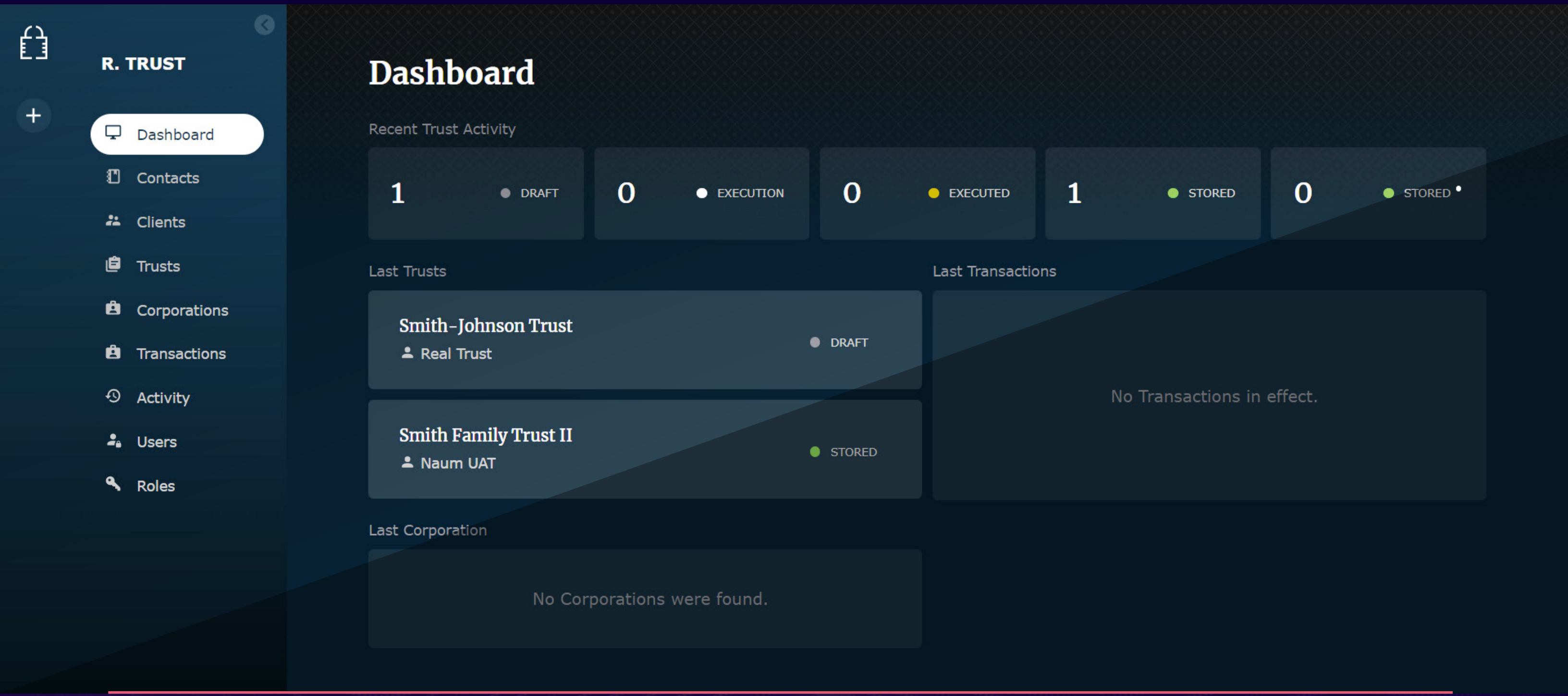
Smart Trust™

Purpose Built
Trust Management Software

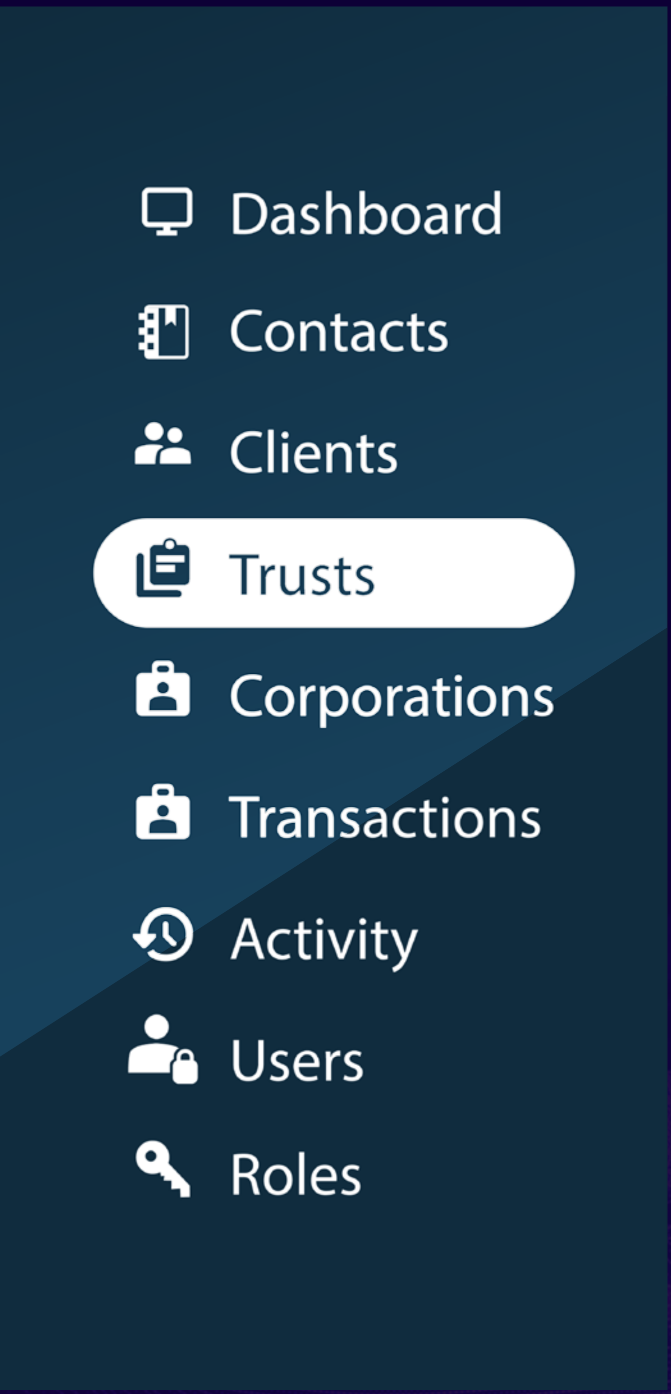
Smart Trust is the sophisticated, state-of-the-art, blockchain enabled trust management platform.

Secure • Efficient • Effective

The days of the paper trusts are over – replaced now by electronic files and digital communications to handle the demands of increased compliance and paperwork and your clients' desire for 24/7 service, faster responses and secure mobile access to every Trust-related document and file.



Every function and feature is designed to improve the efficiency and effectiveness in your practice.



Manage Trusts as a wide structure

- Define the type & jurisdiction
- Useful 'snapshot' feature allows you to scan everything when dealing with client queries or meetings
- Create a Custom repository, binding together any uncategorized documents
- Scan and save the signed originals

Fully Track, Trace and Digitally Record Every Page

Structure every party that participate for any given vehicle, such us:

- Settlor or Grantor
- Trustees
- Beneficiaries (individuals or companies, classes, groups, etc)
- Protectors
- Any type of Advisors

Handle any of our supported Trust Documents, such as:

- Deed of Trust
- Letter of Wishes
- Amendments
- Letters of Distributions

Every document is handled with a versioning feature that makes your work easier, allowing you to search all previous versions.

Asset Types Include:

- Financial and non-financial assets
- Real estate
- Underlying Corporations with their underlying Assets
- Art
- Crypto
- Broker accounts
- NFT
- Customize your own as well

Once you input the Asset's basic information, you can upload any related Documents. Your ability to organize and search for any files or records is incredible.

Purpose-built by Trust Professionals - specifically for Trust Professionals

Smart Trust has been designed **not to replace you**,
but rather **to enhance your ability to manage clients 24/7**.

You Set the Rules

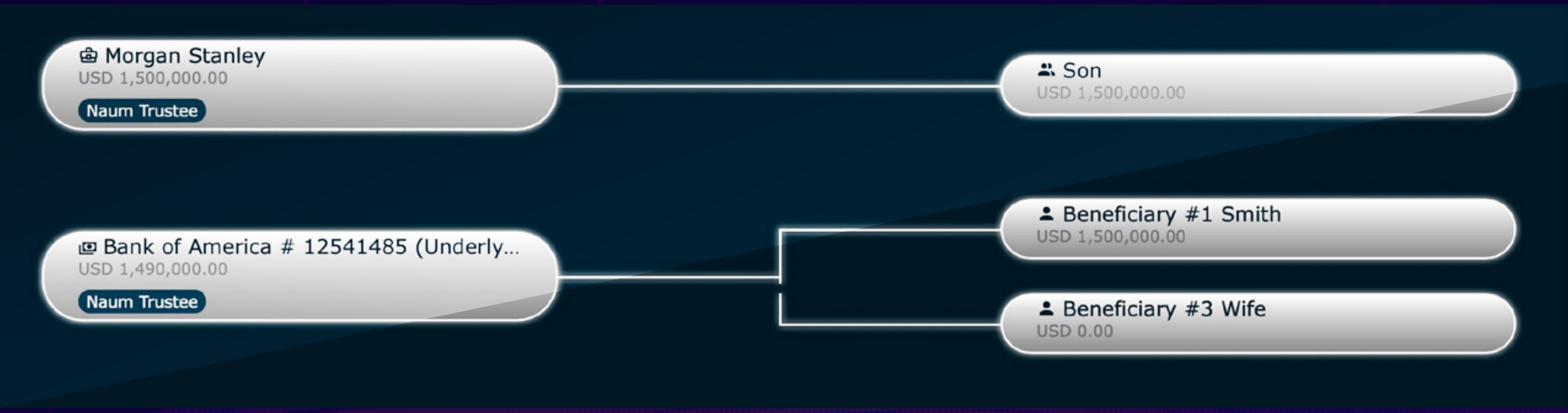
You can customize a rule, setting conditions and even link these rules to the individuals whom you authorize to make decisions or enter transactions.

Rules:

The true power of Smart Trust lies in your ability to customize your rules, such as:

- Highlight any section of any document and bind assets, with beneficiaries
- Set recurring conditions – even linking these rules to the entitled people who are authorized to make decisions/enter transactions
- Easily scan and search your documents/rules thanks to your ability to visually graph any rule you create

Handle every rule in a graphical and interactive manner applying governance & defining:



- The detail for every beneficiary (e.g., a person, a group or category) according to the letter of wishes
- How to manage future distributions
- Set restrictions

Corporations

Fully customizable as well, Smart allows you to track and handle Corporations – from any Jurisdictions – and use them as an underlying corporation for another structure (or autonomous).

Handle their:

- Controlling Parties
- Statutes (with their own versioning)
- Multiple Assets
- (Unlimited) Corporations Documents (with a dedicated storage folder to store a repository of other relevant documents)

Transactions

Track a wide range of transactions:

• **Authorizations:** track any given order/authorization, with or without the consent, depending on each transaction, with time stamp and all the bookkeeping information.

• **Valuation:** keep track of any valuation change that any given asset may have, with the proper attached documents. Once introduced, this valuation change could be Confirmed or Rejected, leaving a full record of any change and approvals.

* This section also performs as the notification centre where you receive any pending transaction waiting for your review (approval or rejection). You'll also be notified of the result of any transaction that you've posted.

• **Manage Assets:** transactions such as account funding

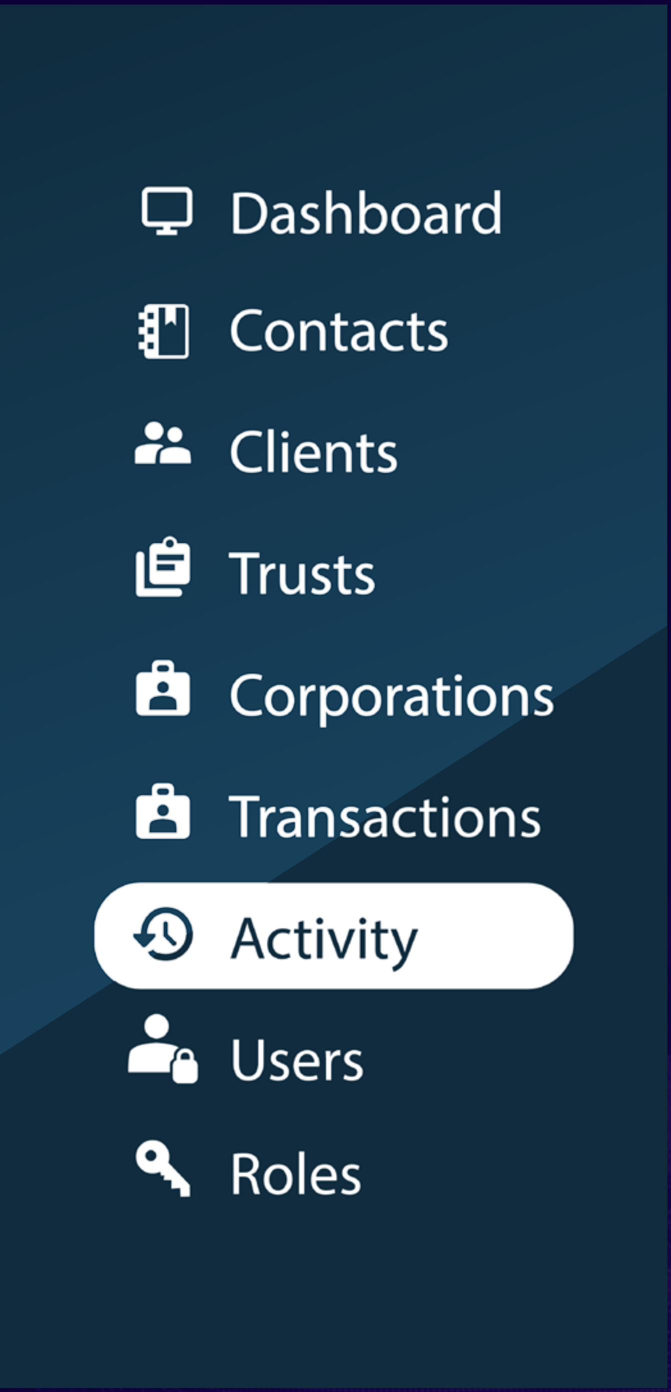
• **Expenses:** keep full track of any type of expenses that occur during the vehicles' lifecycle.

• **Comprehensive Versioning:** details changes at every stage and allows for historical record keeping for documents such as:

- Deed of Trust
- Letter of Wishes
- Amendments
- Distributions
- Custom Documents

• **Voting:** Utilize the option of creating a voting process in which you assign decision makers for each asset, or even create a voting scenario where each related party must Accept, Reject or Abstain for the voting. Every process/transaction can attach the proper supporting documentation and track/record the parties' time-stamped votes.

No more wasted time shuffling through hundreds of files and legal boxes.



Activity

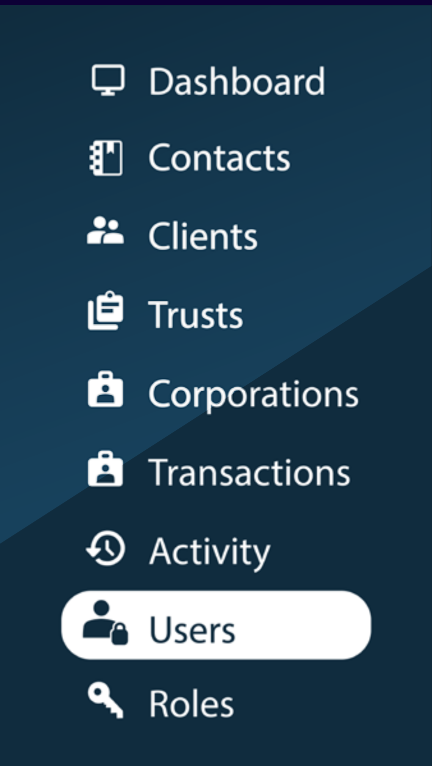
Keep track of every transaction, accurately time-stamped and fully logged. E.G. who posted an expense, who authorized it and what type of documents were attached.

Wondering About Automation?

Smart Trust tracks activities and prompts you through notifications and your dashboard.

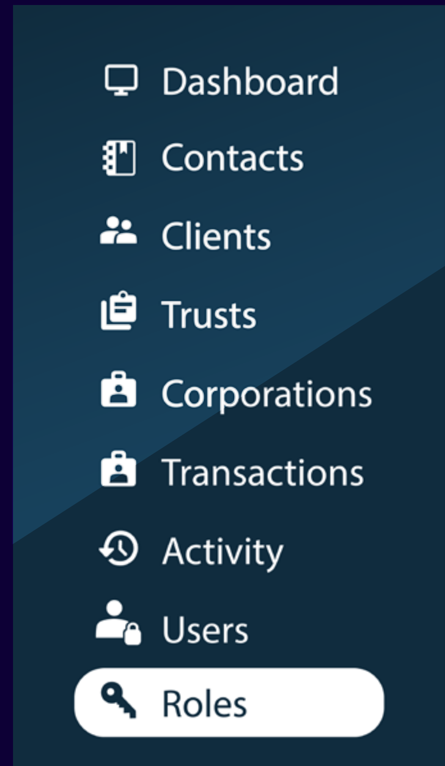
History

Keep track of every traceable transaction - who, what, when, and how every change occurred and where it was performed.
These could be a simple input or a complex transaction, giving you full traceability thanks to our proprietary and advanced encryption technology.



Users & Roles

You define the level of access, clearance and actions allowed for every person involved in your business using Smart's comprehensive and complete toolbox for customizing your entire organization – it doesn't matter whether they are part of your organization or clients, advisors, or auditors. The level of access and roles are yours to define.



Permissioning

For each Structure you assign special permissions and access. It doesn't matter whether the user is within your organization, a client or a banker. You set the rules, access and monitoring.

24/7 interconnectivity with complete managerial oversight

Set precise levels of access for every file and piece of information.

Smart Trust allows you to spend more quality, rewarding and profitable Face-To-Face time with your clients and LESS TIME executing orders, filing, listing, and all the antiquated management procedures that take away from your true management potential.

Contacts

A flexible and robust contact list, KYC, AML, with a wide and customizable 'Document' section for detailing the structures related to this contact, whether they are Corporations or Trusts, and their roles within each structure.

Clients

Same as Contacts plus Extra Information/Oversight, for detailing their investment structure, type of investments and authorized transaction types. Fiduciary Structures, whether they are Corporations or Trusts displayed as a Fiduciary Chart in a glance. Label Clients as 'Active or Inactive' to streamline management and marketing plans.

Handling Contact and Client types

We can handle either Individuals or Companies as contacts and support bulk import to accelerate your onboarding processes.

Security

Smart developed cutting edge technology where we encrypt your information using your password as part of the encryption key along with a cryptological technique called 'hash'. Along with a proprietary security algorithm, your complete file system is monitored, secured, logged and encrypted while still remaining remotely accessible and responsive, 24/7.

Blockchain

Smart is Blockchain-enabled, providing an extra layer of security based on this technology, should you wish to utilize it.

We only store relevant information on blockchain that does not compromise nor expose your information. Blockchain is utilized as a tool to grant you the benefit of timestamping and information inalterability.

For those jurisdictions not able to utilize blockchain technology, the block-chain-enabled feature is optional.

Information Download

We understand that as a practitioner you may need to download all the information form a Trust. Simply log in and click Full Download, receiving the full trust in your pre-configured inbox.

Web and Mobile APP

Smart Trust also includes custom features for the mobile platform and is also compliant with the major web browsers such as Chrome, Firefox, Microsoft Edge, Internet Explorer and Safari.
Android mobile devices require version 4.1 and above.
Apple iPhones require version 11.0 and above.

Mobile web access allows you to respond, anytime, anywhere to client requests as the complete Trust and all its documentation is available via your mobile device – even utilizing the 'snapshot' feature to quickly scan your contents for the relevant client requests.

> Track every document along with every version - **even the signed originals**.

The trust remains secure behind a firewall, encryption, and the specialized passwords you've created. The encryption also timestamps the activities, logging the mobile entry, jurisdiction, time, and other rules you've customized.

You can launch a vote through the mobile platform, never missing important and time-sensitive actions while you're away from the office. You'll even be notified of the Trustee or Trust Advisor's decisions.

Accept or reject transactions, rules, prompts or other relevant actions and log the decisions in real-time – ensuring full disclosure, transparency and 24-hour responsiveness for your most important clients.

Best of all, you'll receive a wide range of notifications and prompts, arranged according to the jurisdiction's time zones in order to comply with deadlines and dates, regardless of where you are in the world.

Smart Trust is customizable to your style and approach to running your organization. Drop down menus, switches, calendars, additional documentation, contacts and everything else that affects the management of the Trust are all at your fingertips.

Martin Litwak

Naum Ravinovich

Designed and developed by internationally recognized trust lawyer Martin Litwak, and blockchain and digital currency/banking expert Naum Ravinovich, **Smart Trust** is THE ONLY industry-specific wealth technology that combines the enhanced security of block-chain-enabled encryption with instant, 24/7 remote digital access.

Already making waves, **Smart Trust** is industry-tested by those who understand and appreciate the power of our digital trust management platform.

"We've been looking for a SaaS platform like Smart Trust for years. The fact that Smart Trust was designed by a trust lawyer to solve a problem in his legal family office makes it all the more relevant for our needs."

SMART STRUCTURING

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Thank you!

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