

Enhance Relationships

Prepare clients for anything life throws their way



Bridge the Generation Gap

Is your client a Baby Boomer retiree or Millennial beneficiary? Are they caring for a loved one or preparing for retirement?

Whatever their stage of life or life event, LifeSite helps you engage with multiple generations of clients by offering a modern, secure “shared information” management tool.



Collaborate in a Whole New Way



Secure file sharing
Eliminate the risk of emailing attachments through unsecure servers.



Encrypted messaging
Alert caregivers to necessary documents or important changes with secure, real-time messages.



Stay up-to-date
Receive client activity notifications so you can offer help when needed.



Easy access
Clients can scan docs with the mobile app or ask for info with the LifeSite skill for Amazon Alexa.



Integration is Key

Integrate LifeSite with your CRM while enhancing the utility of other fintech tools and streamlining the exchange of information.

Life Checklists

Manage any milestone

Planning a wedding? Buying a home? Sending a child to college? Clients need to store all that information somewhere.

Guided preparations

Checklists help clients first identify then save the files and information they'll need for all their major life events.

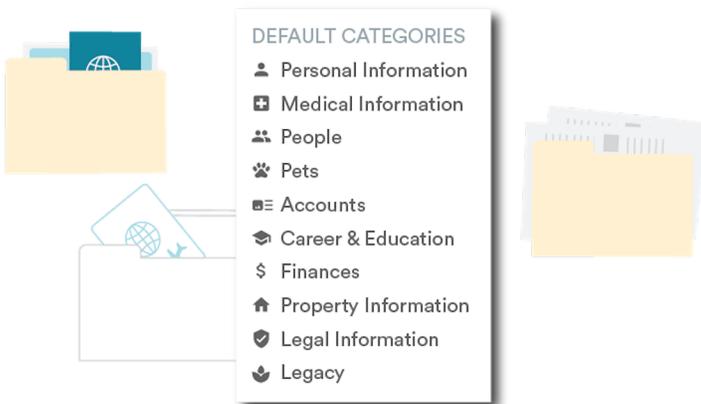
CHECKLIST	MY STATUS	RESPONSES
Rapid Deployment	100%	3/5
Deployment Preparations	100%	1 / 10
Buying a Home	0%	--
Buying a Car	50%	0/3
Changing Jobs	42%	1/2
Going to College	58%	--
Getting Married	--	0/1



LifeSite is an application that we can provide to our clients and their families, which helps us deepen engagement.

If you don't know your clients, you can't give great advice.

— Jay Fong, CFP®, CERTIFIED FINANCIAL PLANNER™, and managing partner, Concentrum Wealth Management



More Than a File System

Dozens of pre-organized categories

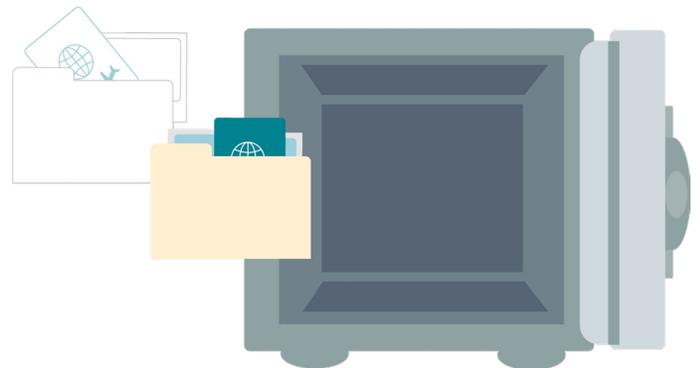
Save information where it makes sense, not in one massive, cluttered folder.

Spend time on what matters

LifeSite's organized, intuitive structure makes information and file retrieval fast and easy.

Industry-Leading Security

LifeSite's layered encryption and unique user encryption keys are all part of multiple layers of privacy and security protocols that constantly monitor and safeguard your information.



Trusted and Verified

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