— EK METHOD BRIEF · No. 06

EK Vault™

The secure, always-current archive of everything EK documents — accessible to the fiduciary from anywhere in the world, at any moment, without a phone call.

— THE PROBLEM

Most Property Records Exist Somewhere. EK Vault™ Makes Them Available Everywhere.

A fiduciary managing a high-value Hawaii estate from the mainland faces a persistent and frustrating reality: information about the property exists, but it is scattered. Vendor invoices are in email. Inspection reports are in a folder somewhere. Photographs from the last visit — if they were taken at all — may be on an inspector's phone or sitting in a file that was never shared. When a beneficiary calls to ask about the condition of the property, or a carrier asks for documentation before renewal, or a court requires evidence of stewardship, the fiduciary must assemble a record from scattered sources under time pressure.

This is not a management failure. It is a structural gap in how property oversight has always worked — information collected in the field, then dispersed, delayed, or lost before it reaches the person who needs it. EK Vault™ closes that gap entirely.

> *"The record should be as available as the property is valuable. For a fiduciary, those two things are inseparable."*
>
> — Estate Keepers Operating Principle

— THE DEFINITION

What EK Vault™ Actually Is.

EK Vault™ is a secure, property-specific digital archive that receives, organizes, and stores every piece of documentation produced by Estate Keepers — from the first onboarding visit through the most recent weekly inspection. It is not a file-sharing service. It is not a generic cloud folder. It is a structured, purpose-built record system that mirrors the discipline of the inspection protocol behind it.

Every property enrolled in EK service has its own dedicated Vault — a separate, password-protected dashboard accessible only to authorized parties. The Vault is updated during each visit, in real time, before the inspector leaves the property. When a fiduciary logs in the morning after a visit, they are looking at a current record — not a pending one.

— THE CONTENTS

A Complete, Organized Record of Everything That Matters.

EK Vault™ is organized across ten folders, each dedicated to a specific category of documentation. Every folder is updated on the schedule its content demands — some during every visit, others on a defined rotation. The structure is consistent across all

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properties, so any authorized party can locate any document without guidance.

#	VAULT FOLDER	CONTENTS	UPDATE FREQUENCY
00	**Overview & Reference**	Service summary, property definitions, contact matrix, and escalation protocol reference	Onboarding · Updated as changes occur
01	**Escalation Log**	Chronological record of every Amber and Red finding — date identified, observation, action taken, and resolution documented	As conditions warrant
02	**Reports (Spectora)**	Full weekly inspection reports with narrative findings, condition ratings, and embedded visit media	Every visit
03	**360° Interior**	Navigable high-resolution interior captures of all authorized rooms and spaces — inspectable remotely from any device	Monthly rotation · Week 1
04	**360° Exterior**	Complete exterior elevation, perimeter, hardscape, and outbuilding documentation in full spatial context	Monthly rotation · Week 2
05	**Drone Documentation**	FAA Part 107 aerial imagery of roofline, gutters, drainage, pool surround, and estate grounds	Monthly rotation · Week 3
06	**Thermal Imaging**	FLIR infrared captures of electrical panels, HVAC systems, plumbing, and moisture-prone surfaces. HOT zone thermal conducted every visit; comprehensive rotation monthly	Every visit (HOT zones) · Monthly rotation · Week 4
07	**Component Condition Reports (CCR)**	System-by-system condition documentation of all powered and motorized components with maintenance tracking, status coding, and trend history	Onboarding · Annual update
08	**Personal Property Catalog**	Photo-based visual documentation of designated high-value contents — art, jewelry, collectibles, furnishings. Add-on service with separate authorization	As engaged · Updated on change
09	**Invoices**	Billing records and service fee documentation for fiduciary accounting and trust administration reference	Monthly

— THE PROTOCOL

Updated During Each Visit. Available Immediately.

EK Vault™ is not updated from an office after the fact. It is updated from the property, during the visit, before the inspector leaves. This is a non-negotiable element of the EK No Homework protocol — the discipline that ensures the record never lags behind the inspection.

Where estate internet is unavailable or unreliable, Estate Keepers operates on independent Starlink satellite connectivity, ensuring Vault delivery is never dependent on the property's infrastructure. The fiduciary receives a same-day notification when each visit is complete and the Vault has been updated.

— On-site upload before departure.

Every report, image, and document is uploaded to the Vault during the visit, before the inspector leaves the property. No exceptions.

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— Same-day fiduciary notification.

A concise confirmation email is sent after every visit — confirming completion, noting any findings, and confirming Vault availability.

— View-only access as default.

Authorized parties can view and download Vault contents. Write access is restricted to EK personnel, protecting the integrity of the record.

— Permanent retention.

All Vault contents are retained for the duration of the engagement plus a minimum of three years following service termination. The record does not disappear when service ends.

— No IT requirement on the estate.

EK Vault™ operates independently of estate internet, networks, or credentials. Access requires only a browser and the client's secure passcode.

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— THE FIDUCIARY VALUE

Not Just a Record. A Defensible Position.

For a corporate trustee, probate attorney, or family office manager, the EK Vault™ is not a convenience feature. It is the primary instrument through which fiduciary stewardship of a physical asset becomes provable. The difference between a fiduciary who can demonstrate care and one who cannot is almost always a documentation gap — and EK Vault™ is designed specifically to eliminate that gap.

FIDUCIARY SCENARIO	WITHOUT EK VAULT™	WITH EK VAULT™
Beneficiary requests proof of property stewardship	Fiduciary scrambles to locate scattered reports, emails, and vendor records	Fiduciary shares Vault access — complete timestamped record available immediately
Carrier asks for documentation at renewal	Fiduciary provides limited or inconsistent records; broker must advocate without evidence	EK Carrier Summary and visit history pulled from Vault — formatted for underwriting file
Water damage claim filed	Pre-loss condition unknown or disputed; claim defensibility is compromised	Most recent visit report and photography establish exact pre-loss condition — dated and archived
Probate court requires accounting of stewardship	Attorney reconstructs a record from fragmentary sources under time pressure	Full visit history, escalation log, and annual summaries available in organized, dated format
Beneficiary disputes condition at transition	No independent record exists to establish condition at any given date	Vault provides week-by-week condition record for the entire period of administration
New trustee or attorney takes over administration	Incoming party has no property history; must start from zero	Vault provides complete continuity — full history transferred with a single passcode

“The value of a record is determined at the moment it is needed — not at the moment it was created. EK Vault™ ensures it exists when that moment arrives.”

— Estate Keepers

— THE ACCESS MODEL

One Property. One Vault. One Passcode.

Each property enrolled in EK service has its own dedicated Vault deployment — a separate, independent dashboard with its own URL and access passcode. There is no shared portal, no account creation requirement, and no technology learning curve. Authorized access requires only a browser and the passcode provided at onboarding.

Access is extended to the designated fiduciary contact and any additional authorized parties specified in the Service Authorization Agreement. Active clients access their Vault directly — the URL and passcode are provided privately and are not published or linked from any public page.

— Each property has a dedicated, independent Vault.

No client's documentation is commingled with another's. Each Vault is a standalone deployment.

— Access is passcode-protected.

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The Vault URL and passcode are provided directly to the authorized fiduciary contact via private communication. Not publicly accessible.

— Access is view-only by default.
Clients and authorized parties can view, navigate, and download. The integrity of the original record is always preserved.

— A demo Vault is available for prospects.
Qualified brokers, attorneys, and fiduciaries may request access to a demonstration Vault built from a real EK onboarding engagement — allowing the full Vault experience to be evaluated before a service decision is made.

— THE STANDARD

A Record That Reflects the Seriousness of the Asset.

The financial assets in a UHNW estate are managed with continuous reporting, secure digital access, and a permanent record of every transaction and decision. A family office does not keep the investment record in a manila folder or a scattered email thread. The record is organized, accessible, and available to any authorized party at any moment.

The physical estate has never been held to that standard. A property worth ten or twenty million dollars has been managed with vendor texts, occasional site visits, and institutional memory that walks out the door when the property manager changes. EK Vault™ applies the same discipline to the physical estate that has always been applied to the financial one.

> *“The property deserves the same rigor as the trust. EK Vault™ is where that rigor lives.”*
>
> — Estate Keepers

— THE SUMMARY

Always Current. Always Available. Always Defensible.

EK Vault™ is the living record behind the EK Record of Care™. It receives every inspection report, every photograph, every thermal image, every aerial capture, and every escalation log entry generated by Estate Keepers — organized by property, indexed by date, and available to authorized parties from anywhere in the world during each visit.

It does not require an IT department, a property manager's cooperation, or an estate staff member to maintain. It is built, updated, and curated entirely by Estate Keepers — as part of the weekly service, at no additional cost, on every visit, for every tier, without exception.

For a fiduciary responsible for a property they cannot always visit, EK Vault™ is the closest thing to being there.

Estate Keepers · Method Brief No. 06 · EK Vault™ Part of the EK Method™ brief series — available upon request.

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