



ASSET VANTAGE

Financial Clarity Through Technology

ENABLING YOUR

VIRTUAL

FAMILY

OFFICE

GO VIRTUAL

GET THE BENEFITS OF A FAMILY OFFICE, AT A FRACTION OF THE COST.

A Virtual Family Office (VFO) gives you greater insight and control by providing individual and consolidated views of your family's entire net worth. The Private Cloud based technology platform enhances flexibility and choice, minimizing personnel dependencies and high fixed costs.

- Own your data & access it on a Virtual Private Server
- Seamless access through web & mobile app
- Retain global best-in-class service providers & domain specialists
- Enable better accountability through an IPS & SLA driven approach
- Easy access to timely, accurate data helps you better control risks



AUDIT, LEGAL & TAX

Grant conditional access of consolidated data to specialists as and when required. A single source of data results in higher efficiency & more timely deliverables.



INSURANCE & PERSONAL ASSETS

Track insurance policies across providers. Maintain a record of personal assets like art, jewelry, real estate etc.



FAMILY BOARD & INVESTMENT COMMITTEE

Ownership of data, reports & analytics for informed decision making resulting in greater transparency & control for the family. Flexibility to switch service providers as data is owned by the family.



ASSET VANTAGE ENABLED VFO

Secure data storage with document management & centralized control with authorized user profiles.



ACCOUNTING

Handle data aggregation, investment accounting & reconciliation services through domain specialists trained on Asset Vantage.



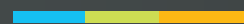
BANKING & CUSTODIAL DATA

Link banking & custodial service providers aggregating all entity & account data for individual & consolidated view.



INVESTMENT ADVISORY

Provide a controlled view to internal & external advisors, enabling them to track risk and returns across investment strategies. Have informed conversations on how liquid & Illiquid financial assets are performing.



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