

Family Office Handbook

Run your Family Office like a business.

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ASSET VANTAGE

Family offices are perceived as exclusive institutions with sophisticated operations. Really, they are nothing but a tool for your family's financial wellbeing. My own family office is the cornerstone of my personal and business life. I realized there were many others like me in search of a simpler approach to managing their wealth. We founded Asset Vantage to make the solution widely available.

You don't need to be an expert in finance and accounting to set up a family office. Tell me, do you need to be Roger Federer to hit a tennis ball with a racquet? So read on, and

hit that ball

Sunil K. Dalal

Chairman,
Asset Vantage, a UNIDEL company



Wealthy individuals often **fail to treat personal wealth with the same respect, rigor and discipline** that they apply to their family businesses or professional lives.



A small increase in returns or reduction in costs leads to a dramatic increase in the long term value of your portfolio. For example, a USD 10M portfolio's returns increasing by just 1% over 10 years results in an **incremental USD 2M.**

IRR

8%

Portfolio Value Year 1: **USD 10M**
Portfolio Value Year 10: **USD 22M**

IRR

9%

Portfolio Value Year 1: **USD 10M**
Portfolio Value Year 10: **USD 24M**



Family offices come in a variety of sizes. The value and complexity of assets and investment vehicles differ. They can be structured to suit your family's unique needs and lifestyle.

Until now there hasn't been a

single source of information

to guide family principals or their professional staff on family office-specific operations and measurement metrics.



FAMILY OFFICE 4.0

Forward-looking families have joined the family office revolution. You too can reclaim control over your personal finances by embracing technology.

The **Family Office Handbook** is the starting point in your journey to financial freedom.



Family Offices are no longer solely the preserve of the ultra-rich. Developed by Asset Vantage — the award winning and leading authority on family office operations technology — the **Family Office Handbook** lets you in on a host of **secrets and industry best practices.**

Access it on familyoffice4.com





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