

TECHNOLOGY TO ENABLE YOUR VIRTUAL FAMILY OFFICE

For Single & Multi Family Offices



GO VIRTUAL WITH ASSET VANTAGE TECHNOLOGY

ENABLE A VIRTUAL FAMILY ECOSYSTEM AT A FRACTION OF THE COST.

Our Private Cloud based technology platform enhances flexibility and choice, minimizing personnel dependencies and high fixed costs. This allows you to setup your Virtual Family Office (VFO) in turn giving you greater insight and control by providing individual and consolidated views of your family's entire net worth.

- 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 TECHNOLOGY POWERED VFO

Own the software with secure data storage & document management giving you a 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.

UNITED STATES

Greater NYC Area

One Dock Street
Suite 201, Stamford
Connecticut – 06902



INDIA

Mumbai

167, Atlanta Building, J. B. Road
Nariman Point, Mumbai
Maharashtra – 400 021

Pune

9th Floor, Smartworks Building
S. No. AP81, Koregaon Park Extension
Maharashtra – 411036

SINGAPORE

10 Jalan Besar,
#10-10 Sim Lim Tower
Singapore – 208787

sales@assetvantage.com

© Copyright Asset Vantage | 2024 | June

The information contained in this document is only for the information of the intended recipient and may not be used, published or redistributed without the prior written consent of Asset Vantage.



www.assetvantage.com

ASSET VANTAGE | A UNIDEL COMPANY