

Case Study

How a Leading Chicago-Based Accounting Firm Elevated their Family Office Practice with AV

AV helped streamline multi-entity family office accounting and consolidated performance reporting to allow the family office team to focus on client relationships



The Challenges

Without Asset Vantage

- **Multi-Custodian & Entity Complexity:** Multiple assets, both liquid and illiquid, held in partnerships and trusts made reporting delayed and high-level.
- **Lack of Transparency:** The firm struggled to give families a complete view of their wealth with full drill-down, limiting decision-making.
- **Dependency:** The firm was dependent on a handful of experts managing reporting using spreadsheets, rather than client relationships, thus increasing operational risk.
- **Growth Bottlenecks:** As the firm's client base grew, servicing lagged to match the scale.



The Solution

With Asset Vantage

- **Integrated Platform:** Consolidated multi-entity reporting helped them understand their total balance sheet.
- **Trusted Partnership:** Giving client families a clear picture of their wealth in a timely manner each month and strengthening their trust in the firm's advisory role.
- **Process Independence:** Teams no longer relied on spreadsheets for consolidated reporting and accounting, reducing errors and improving turnaround time.
- **Scalable Growth:** Internal teams onboard and manage clients independently through structured, guided training. Their time is freed up to focus on the client.



"AV wasn't just the right product; it was the right partner. Their team trained our staff to manage onboarding and monthly workflows. They delivered smooth implementation within 8–10 weeks and backed it all with their white-glove service that built our trust in them."

Family Office Services Director, Accounting firm, Chicago, USA

Trusted by 400+ modern families to run their offices with clarity and control.

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