



Pat. #10789572 & Pat. Pending

Building Your Digital Family Office With iPaladin®

It's important to know exactly what's going to happen at each phase of your iPaladin Digital Family Office™ design and implementation. With our experienced team, you'll never have a question about what the next step is or what we are working on. We know there is a lot at stake, and we will make sure you have what you need at every phase. We've been working with family offices for over ten years to design and implement what's important to them. As your digital design partner, we will spend time with you to understand exactly what you are envisioning and make sure it comes to life so you can stay strategically focused on what is required to fuel growth of your wealth. Here's what our all-in-one first year process looks like.

Phase 1 – Centralize Your Current Information

The first step is to inventory the offices, systems and devices that are currently storing your wealth information, including external advisory offices. Then, our experienced team will coordinate with each stakeholder impacting your wealth to identify the spreadsheets and calendar systems they are currently used to track your wealth operations and the functional storage locations for your wealth documents. Next, we will provide a temporary secure location for each functional role to centralize the wealth information one place so we can begin building your digital family office.

Phase 2 – Build Your Digital Family Office

Our team will build and import, while your team reviews and verifies. For each family member, wealth entity, asset and liability, we will create a unique governance environment. Then, we will standardize your documents with knowledge classifiers (duplicate document copies and inconsequential drafts will not be needed). Next, we'll collaborate with your experts to digitally design new streamlined end-to-end processes to eliminate the intermediary steps. Finally, with a bird's eye view of your family office, you will determine full and limited access requirements for family members and the network of people who impact your wealth.

Phase 3 – Launch your Digital Family Office

Conducting a shift of operations from disparate systems to a centralized Digital Family Office system is a big undertaking.

It's why we map everything out for you. Our launch plan will make it easy and efficient for each role within the family office network to swap out their old systems for your new DFO system. We'll even be available one-on-one to ensure success.

