

# iPALADIN: THE SOLUTION

## CONNECT

every person that impacts a family's wealth - the family members, advisors and administrators, remote or on-site, employed or outsourced

## INTEGRATE

finance, investments, tax, law, administration, lifestyle and family governance in one place

## DIRECT ACCESS

every person has direct access to what's needed for their role, making digital collaboration, natural and intuitive, enabling everyone to work together in one accord

## ORGANIZED

everyone's contributions are contextually organized in records for quick insight from one source of truth



Pat. No 10789572 and Pat. Pending

progress from good to great simplifying information and work with context

	client portals <i>no metadata</i>	CRM and document management systems <i>simple metadata</i>	Knowledge blockchain <i>contextual metadata</i>	
centralized management system	none	limited	comprehensive and reliable	
Family governance	none	none	adaptive and role-based	
communication	none	limited	encrypted and captive	
document management	limited	yes	uniformly classified duplication control	accounting system ↔ + ↔ portfolio system
enterprise compliance	none	limited	automated end-to-end	
enterprise tasks	none	limited	semantic and contextual	
Collaboration and meetings	none	limited	contextual and integrated	
security	limited	limited	military-grade	
service and support	none	limited	family office experts	

CONFIDENTIAL