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Family Office FINTECHSUMMIT by FAMILY WEALTH REPORT

VIRTUAL TECHNOLOGY DEMONSTRATION DESCRIPTIONS

Integrated Fintech for Family Offices and Ultra-High-Net-Worth Individuals

SEI New ways. New answers.®

Flexible, scalable technology is core to managing complex wealth which is why SEI's award-winning Archway Platform℠ seamlessly integrates accounting, investment data aggregation and client reporting functions within a single technology solution. Join Marissa Frizzell from SEI Family Office Services as she demonstrates how SEI's versatile fintech platform streamlines daily operations – including complex partnership accounting, investment consolidation and bill payment functions – to produce comprehensive, accurate financial reporting for family offices and financial institutions.

Eliminate the Stress of Updating your GL

KnowLedger

Is your period-end processing filled with last-minute number-crunching, late-night data entry, or frantic custom report generation that leaves you exhausted? If so, you're likely falling into the same traps as other offices who are using too many manual processes. Join Ryan Kerry of KnowLedger to learn some easy steps you can take to avoid these headaches and run your office in 2020 the smart way.

Family Office Technology Solutions

NORTHERN TRUST

Join us for a demo to see Northern Trust's Global Family Office (GFO) technology strategy, featuring our integrated technology platform, Wealth Passport®; Front Office Solutions, a multi-asset class reporting solution; Anchor Analytics, a reporting and technology solution allowing for customized reporting; and finally, our unique approach to supporting partnership accounting, general ledger and tax services.

Private Capital Group for Family Offices, Foundations and Endowments

SS&C

SS&C's Private Capital Group delivers solutions to private wealth funds for handling the complex securities, sophisticated investment strategies, multi-tiered ownership structures, global investments and increasing regulatory demands that characterize this market. Helping managers eliminate the cost, risk and time of integrating disparate systems through a fully integrated, multi-currency portfolio management, financial and partnership accounting for family offices in a secure environment. We deliver integrated reporting for multi-tiered ownership structures, multi-asset class investments and increasing demands that characterize this market.

Providing Scale and Control in Bill Payment and Financial Reporting

AgilLink℠ BY DATAFACTION

Does your firm offer family office services such as bill payment and financial reporting? Are you struggling with scale and having proper business controls? Datafaction services the needs of family offices, business managers and sport management firms that offer pay bill and accounting services. Our specialized accounting and secure bill payment solution incorporates document management, approval workflow and online integration with City National Bank. Datafaction is an RBC company and is an affiliate of City National Bank, Member FDIC.

Tel: +44 (0) 207 148 0188 • Fax: +44 (0) 207 504 3610 • info@clearviewpublishing.com
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Powering the Future of Private Finance

PRIVATE WEALTH SYSTEMS

During this break-out session we will walk through the need to decentralize private finance via a digital eco-system. We will also discuss the inherent and hidden challenges of capturing, correcting, calculating, and presenting actionable intelligence that supports every aspect of an ultra-high net worth individual's complete balance sheet, regardless of ownership structure, instrument type or global jurisdiction, without sacrificing data accuracy, privacy, personalization, or operating scale.

Managing Family Wealth in the Digital Age

sage Intacct

In 2020, technology advancements, market disruption, and the ever-evolving global and business environments are challenging family offices to re-examine their purpose and strategies. To stay ahead of it, family offices need a modern financial management system that meets complex wealth portfolio goals and diverse lifestyle requirements. From seamlessly managing multi-entities to constantly evolving regulations, Sage Intacct helps family offices to free up their time so they can focus on what matters most – all while accelerating innovation.

Introduction to Zenith

Zenith

In this short demo period of 35 minutes we will focus on the philosophical design of the system with emphases on the data; Drilldown/Look through, Excel Access and Non-Traditional Reporting. The ability of the system to present data from a single entity point of view to the multiple entity point of view without the need to navigate through multiple functions.

You Need More than just Portfolio Reporting

d1g1t

As a family office, you require a modern wealth management platform that meets the unique, sophisticated needs of your families and their investments, and highlights the high-value services that set you apart. d1g1t is the first enterprise wealth management platform powered by institutional-grade analytics and risk management tools that enables you to elevate the quality of your advice and demonstrate its value to your clients. Come and join us to learn more!

Alchemist: the Multi-Asset, Multi-Market WealthTech Platform

Wealthium

A state of the art multi asset, multi market platform (not a robo-advisor) designed to empower the investment selection process of wealth managers and family offices. With all asset classes (equities, bonds, collectives, FX, commodities, PE/VC dealflow etc) in a modular setup, the user can interact and extract tailor-made investment ideas, demonstrate transparency, and truly serve bespoke mandates. WealthTech power at the fingertips of the investment professional whether in the office or in client meetings.

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