






NOTIFICATIONS

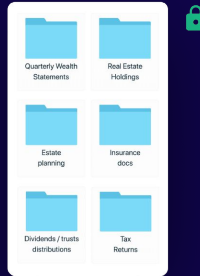


Notifications

-  **Amelie Gaziello liked R&D Meeting**
October 12, 2020 12:19 PM
-  All participants have signed **22042019 Wayne Take Over Bid.pdf**
October 12, 2020 11:24 AM
-  **Sam Gubel mentioned you in 20.06.30-Monthly-Report-PV-Buyback-USA.pdf**
October 12, 2020 11:11 AM
-  **Amelie Gaziello has requested your signature on 22042019 Wayne Take Over Bid.pdf**
October 12, 2020 11:00 AM
-  **Amelie Gaziello shared 22042019 Wayne Take Over Bid.pdf with you**

[See More](#)

PRIVATE VAULTS



Partnership Toolkit

Associations & Event Organisations



created by **Frank Tobé**
a year ago • Family Members

Documents to Sign 8

Your signature is requested

0 of 1

[View and Sign](#)

Contract for final handover of shares from the Wayne take-over.

[Download](#)

Like • Comment • Notify • Follow • Tag People

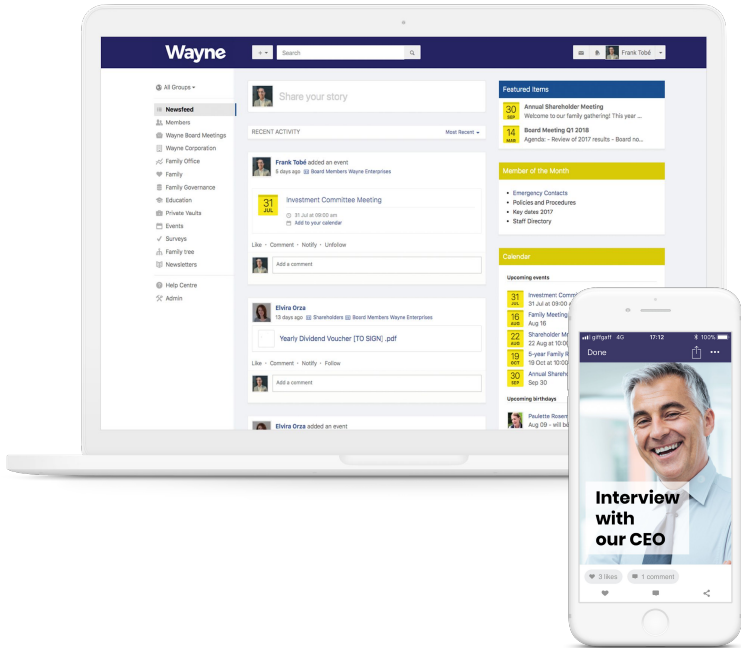
Add a comment

E-SIGNATURES

Karla Powell

X

Trusted Family is the leading governance platform for family businesses & family offices



Client Platform Figures

 150+ Clients

 3,876 files uploaded/month

 177 meetings scheduled/month

 34,210 sessions/month

Industry Connections

 7000+ Companies in our database

 24000+ prospect newsletter contacts

 13000+ TF page views/month

 4000+ Social Audience/month

We help your clients drive effective decision making leveraging technology



Delivering and storing sensitive information securely



Reaching members where they are



Adapting to the needs of the next generation



Keeping everyone up to date with the information they need



Facilitating collaboration between staff, advisors and family members



Scheduling, running and following up on meetings effectively

Delivering value and business growth across the family ecosystem

Enable board and committee governance

- Organise board and committee meetings
- Approve and sign meeting minutes
- Archive and share sensitive documents
- Vote on resolutions through surveys

Facilitate shareholder management

- Organise shareholders meetings
- Approve and sign meeting minutes
- Create private vaults for individual shareholders
- Educate and engage with shareholders

Streamline family office operations

- Centralise documents with controlled access
- Share financials via secure vaults
- Collect e-signatures and collaborate real-time
- Maintain staff and advisor directory with historical record

Enhance family cohesion across generations

- Keep your family close with news & updates
- Record and celebrate your family history
- Build & maintain an interactive family tree
- Stay in touch with secure messaging

Our ideal client

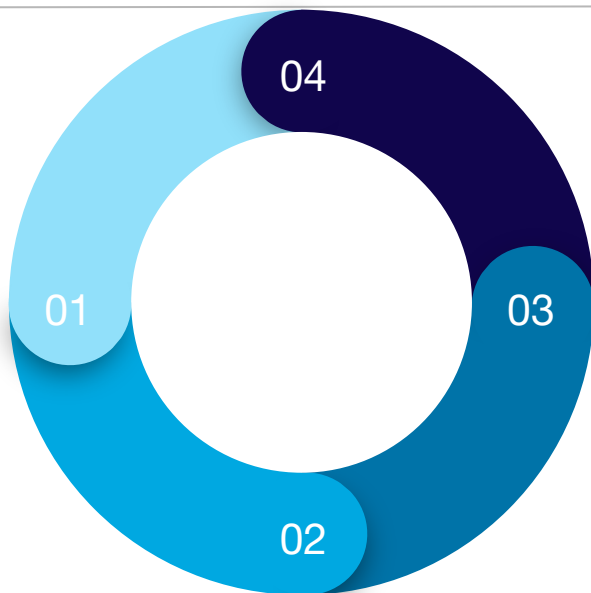
Before working with a family it is important for us to make sure the family is the right fit

Family governance defined

The family must be aligned on their family vision and have some governance bodies in place (*boards, councils, committees, trusts...*)

\$100M+ in shared assets

The platform requires families to have some complexity (multiple investments, boards..) Our clients are all over 50M in shared assets



10+ family members

The platform must reflect the governance structures of families. A minimum of 10 members is required

1 main administrator

For the platform to be a success someone needs to own it. We suggest hiring or appointing someone from the family office or family for this role

Why we should work together



Our networks align

We both have extensive connections and understandings of how to support families in being successful.



Technology to engage your communities

Leverage our technology to engage and drive more value to your communities. NextGen training programs, online courses, members directory, sharing of knowledge and many more.



Our technology to support your services

Families are starting to operate as businesses and the NextGen requires more collaboration, speed of delivery and high quality service. This is forcing us to challenge the current way of engaging with them.

Why organisations like to partner with us



We help you to grow your communities through our network of families and leveraging our technology



We help internationalize and bring greater value to the member community online.



Through detailed statistics, gain insight into your members. Better understand their needs, their interests their engagement with your members and company.



Complementary services were our mission is to help you to retain existing clients, increase client satisfaction & grow your relationships with all the generations of members.

Gold-standard in cloud security and data privacy

Why families trust us

Confidentiality

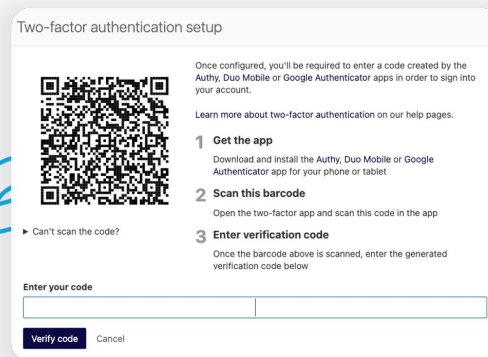
- Biometric identification and two-factor authentication
- Customizable passwords and permission policies
- Specific privileges for platform administrators

Integrity

- Encrypted data in transit and rest
- Intrusion detection and Distributed Denial of Service Defenses
- Virus and malware scanning across the board

Compliance

- 100% adherence to international information security standards
- Fully compliant with the General Data Protection Regulation (GDPR)
- Follow the National Institute of Standards and Technology (NIST) Cybersecurity Framework



Backed by expertise, innovation and technology



Human-centric approach

We have designed the most simplified digital governance platform thanks to our turnkey, configurable and intuitive proprietary technology designed by experts for professionals of the family enterprise world.



Complementary DNA

Fueled by expertise, innovation and technology, our core DNA lies in helping your clients better communicate, create greater cohesion and achieve long-term sustainable success.



Legacy of Excellence

With our proven track record of over 12 years serving leading investment enterprises worldwide, we understand how to bring cost savings and efficiency gains to modern-day governance.

Partner Testimonial

“Building an online community is so much more than having fans or followers. It’s about people connecting, establishing and maintaining relationships, adding value to one another. With the Trusted Family platform, we can now focus on our audience and support them in becoming responsible NextGen members in their families.”

[Haus-Next](#): The Platform by NextGens for NextGens



Haus
Next

Multi-tier partnership program

Membership Level	What that means for you?
Affiliate	Investing in you - the resources, programs, and tools we offer to help you train your team, differentiate in the marketplace, and connect with existing and new customers.
Growth	A growth launchpad - With access to a broad range of the Trusted Family services, we empower you to build and deliver solutions that can address any customer scenario across markets.
Business	The power of together - The Trusted Family Partner Network is built on a simple premise: together, we can accomplish more. When you join the network, you become part of a community with a shared goal to do more for our customers.

1. Partner Enablement

- a. Access to Trusted Family Partner Portal
- b. Use of Trusted Family Logos
- c. Access to Online Enablement Program
- d. Access to Regional Trainings
- e. Go-to-Market Resources

2. Revenue Opportunity

- a. Commission
- b. Services Opportunity
- c. Technical Sales Assistance

3. Co-marketing

- a. Community meetups
- b. Co-hosting events/webinars/conferences
- c. Co-creating content

Let's get in touch!

Schedule a call with our partnership manager [here](#)

