






NOTIFICATIONS


   Karla Powell







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





-  Quarterly Wealth Statements
-  Real Estate Holdings
-  Estate planning
-  Insurance docs
-  Dividends / trusts distributions
-  Tax Returns

Partnership Toolkit


Family Business Advisors





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


Documents to Sign  8

Your signature is requested


 0 of 1

 [Reload and Sign](#) 

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

 [Download](#)

Like • Comment • Notify • Follow • Tag People

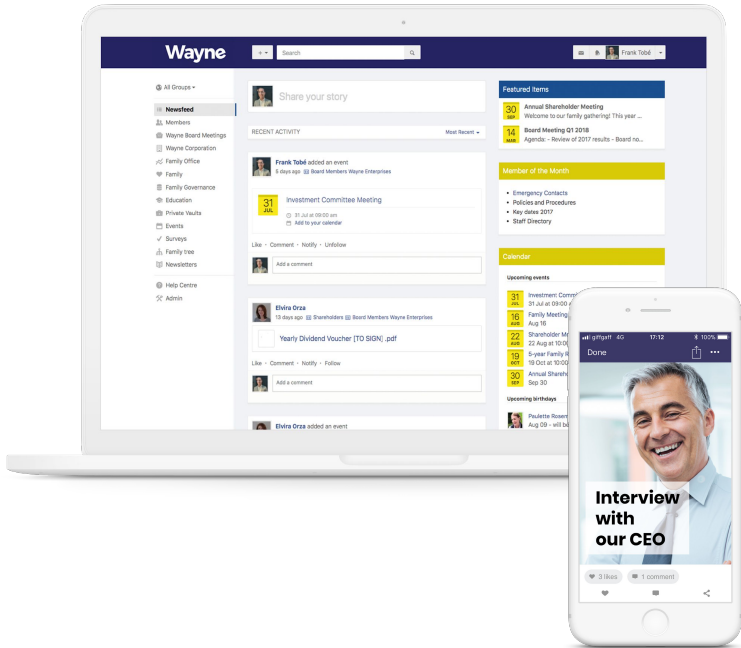
 Add a comment

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

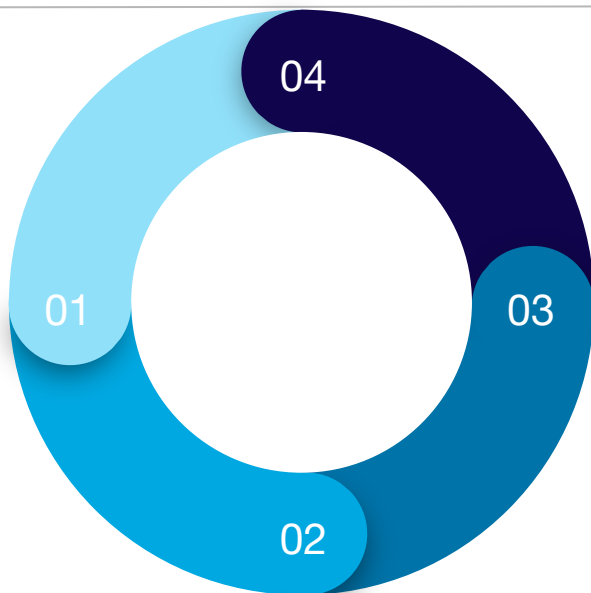
Before working with a family it is important for us to make sure the family is the right fit

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.



Productive Governance

Effective decision making must be made effortless and be embodied in the governance structures of families. Our mission at Trusted Family is to help advisors deliver just that.



Our product supports your service

Families are starting to operate as businesses and the NextGen members require more collaboration, speed of delivery and high quality service. This is forcing us to challenge the current way of working.

Why advisors like to partner with us



We will help you build new revenue opportunities & acquire new clients leveraging our technology to deliver & scale your services



Use our software to education & support new shareholders, board members in their new roles.



Through detailed statistics, gain insight into your clients to track progress made. How is the family working together? What challenges do they face? Are the people doing their jobs? What can be improved...



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

Gold-standard in cloud security and data privacy

Why families trust us

Confidentiality

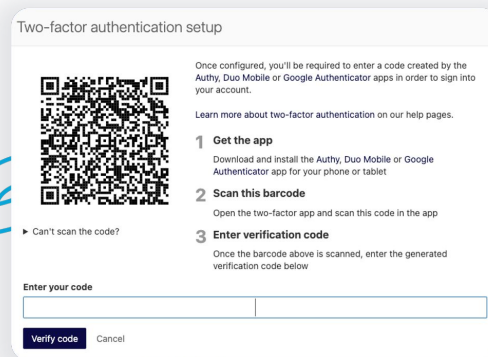
- Biometric identification and two-factor authentication
- Customizable passwords and permission policies
- Specific privileges for platform administrators

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

"Governance is the blueprint or map, the technology is the journey. Having a map without a target or goal does not make sense. However if you have a map with a goal, the Trusted Family platform is the tool that will help you to walk the path and help you see your governance come alive."

Tsitsi Mutendi, Family Governance Specialist, Nhaka Legacy



Partner Testimonial

“Our activities complement each other, the Trusted Family platform enables to deploy what RoCh Conseil implements with families. When we talk about succession, cohesion, or knowledge exchange the tool is there, it is made for that. This tool allows us to intervene in depth and on a daily basis in the functioning of families. This is the power of the Trusted Family platform.”

Romain Chevillard, Family Governance Specialist, RoCh Conseil

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](#)

