






NOTIFICATIONS

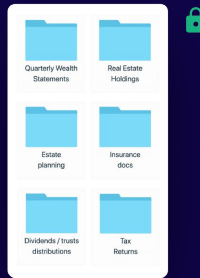


Notifications

-  **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

Wealth Managers



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

Documents to Sign 8

Your signature is requested

0 of 1

[Reopen and Sign](#)

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

[Download](#)

Like • Comment • Notify • Follow • Tag People

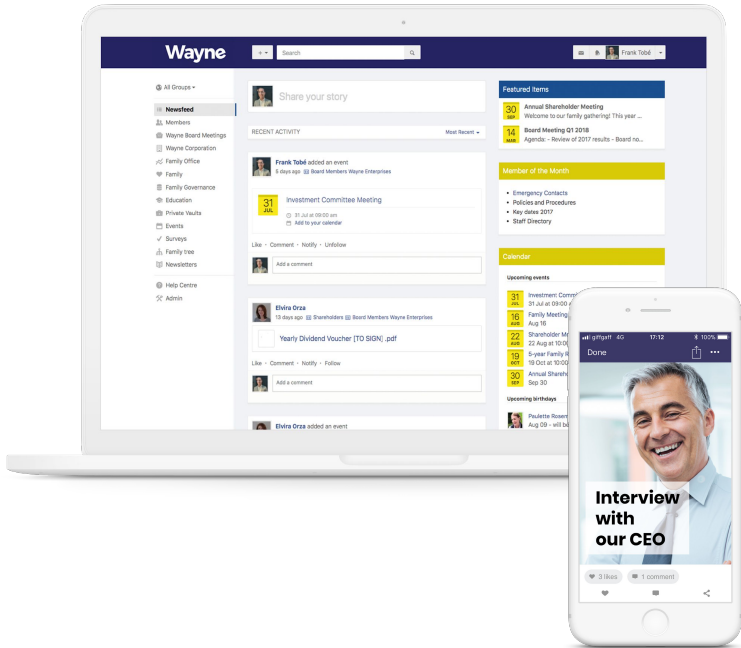
Add a comment

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

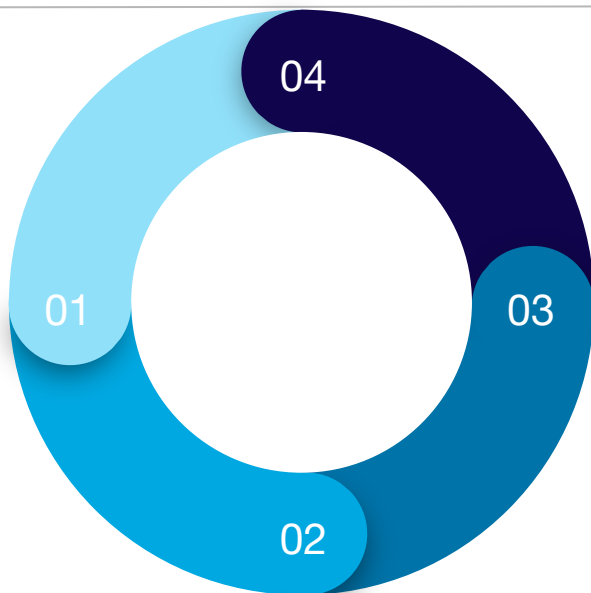
Before working with a family it is important for us to make sure the family is the right fit

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

Acknowledgement of growing challenges

A holistic and personalized offering for private clients

50%

Of the global workforce are millennials

Wealth managers must leverage existing relationships to develop deeper insight.

- Become a trusted advisor
- Gain deeper insights into the families
- Build relationships and services that meet the changing requirements of millennial

75%

Of millennials would switch private bank if they find a better alternative

Alternatives are already underway & growing. The number of FinTech firms offering digital banking services have tripled in Europe while the number of private banks are in gradual decline.

40%

Loss on profitability for European Wealth Managers over the past decade

Though the market size of bankable assets have grown by >60% the profitability of private banks have declined. This gap between profitability and market size shows that wealth managers are failing to serve the needs of families and that the industry is facing an innovation gap.

Seeking for opportunities & how we can help

A holistic and personalized offering for private clients

Broaden Expertise

Wealth managers will require to broaden their capability and offer new services across the full investment landscape

Build relationships

Wealth managers will need to develop deeper insights into the families. Act as a trusted advisor and understand not just the wealth topics but also insights into the nextgen interests and lifestyles

Harness technology

Leverage technology to enable improved digital service offering more suited to the next-generation clients.

Why we should work together



Our networks align

We both have extensive connections and experience working with UHNWI. Our network of 160 family clients is there to share best practices and shared learnings.



A holistic offering

Data management is nowadays as important as wealth management. It is a topic that banks need address with their UHNWI clients. Our mission at Trusted Family is to help you deliver just that!



Deepen relationships with your clients

Build a stronger relationship with your UHNW clients by engaging with all generation of members through our web and mobile technology platform.

Why wealth managers 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

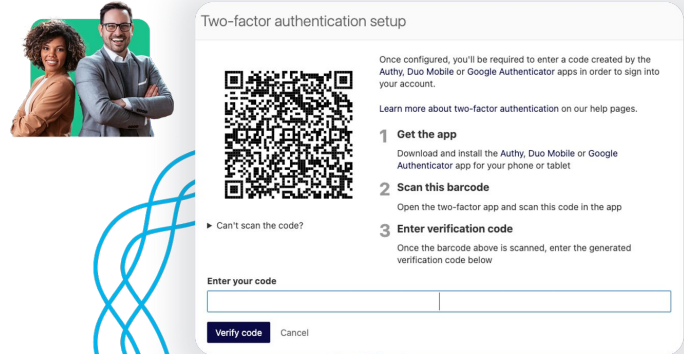
- Biometric identification and two-factor authentication
- Customizable passwords and permission policies
- Specific privileges for platform administrators

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.

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](#)

