



Technology innovation for your family office

Flexible, customizable solutions that adapt as your family's goals and priorities evolve

RSM

Family office challenges

Transparency and real-time access to information are essential for daily operational efficiency and strategic decision-making. However, achieving operational excellence can be difficult without a well-defined strategy to streamline processes among team members.

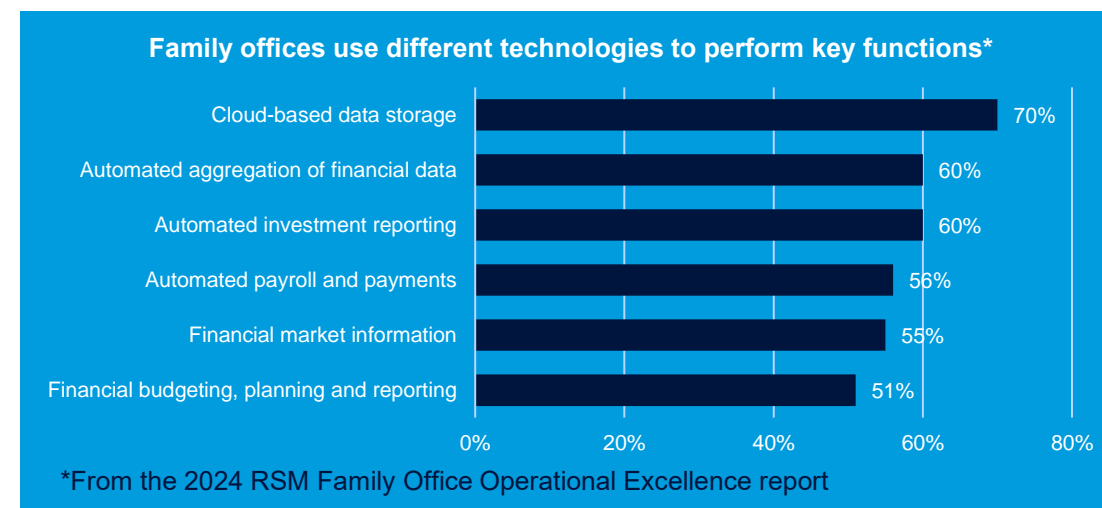
What are your top goals?

- Efficient wealth aggregation process
- Automated processes
- Seamless partnership reporting management
- Digital and accessible document storage
- Integrated multi-solution application
- Dependability in talent acquisition and retention
- Data security plan
- Data-driven insights and decision-making

The power of FamilySight®

To tackle the unique challenges of family offices, RSM created FamilySight—a cloud-based dashboard with customizable technology solutions that support strategic, timely decision-making. Tailored to your family's complexity, FamilySight and RSM services can clarify your family office ecosystem and manage a range of operational components, including:

- Wealth aggregation and reporting
- Individual and fiduciary tax compliance
- Finance and accounting outsourcing
- Tiering of complex partnership structures and relationships
- Information technology and cybersecurity
- Portfolio management
- Advisory collaboration
- Secure document exchange
- Valuation services
- Project management



We asked family offices about their biggest technology pain points. Here's what they had to say:

Data quality might be inadequate, resulting in erroneous insights and judgements."

"Too many sources of data and **no single solution** to aggregate the information and present it in a unified manner."

Centralized data, seamless integration

FamilySight enhances collaboration among you, RSM, and your advisors by providing seamless data access—optimizing your wealth management today and in the future.

| Your Family Office |

Secure document exchange
for all relevant tax, accounting, investment, and consulting information



Innovative automation and AI solutions

replace labor intensive business processes



One Ecosystem

enables comprehensive decision making across advisors



Unique permissions

tailored for each family member and advisor



Customizable status reports

help keep stakeholders across projects, business, and personal processes informed and aligned



Critical business and family events

are integrated into a shared calendar simplify and broaden visibility across the family office



One-click access

to relevant thought leadership, forums, and networking opportunities



Cloud-based technology

enables daily aggregation of liquid and illiquid portfolio data and passion assets, visible in a clean dashboard



Direct Connections to Financial Intermediaries ensuring the highest standard of data quality

Alternative Investments integrations and reporting

Dynamic reporting, tailored output and custom dashboards

Passion Assets tracking such as Collectibles, Automobiles, Art and more.

Secure data transfer, document repository.

Command Center services provide one stop shop to all things RSM!

Cloud-based tiering and allocation engine

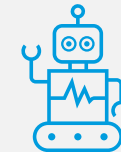
- Investor
- Investment
- Legal Entity

Partner Sight®

Family Sight®



Gather



Automate



Input



Prep



File