



iPaladin[®]

The Digital Family Office

Pat. #10789572 & Pat. Pending



INTRODUCTION | September 2020

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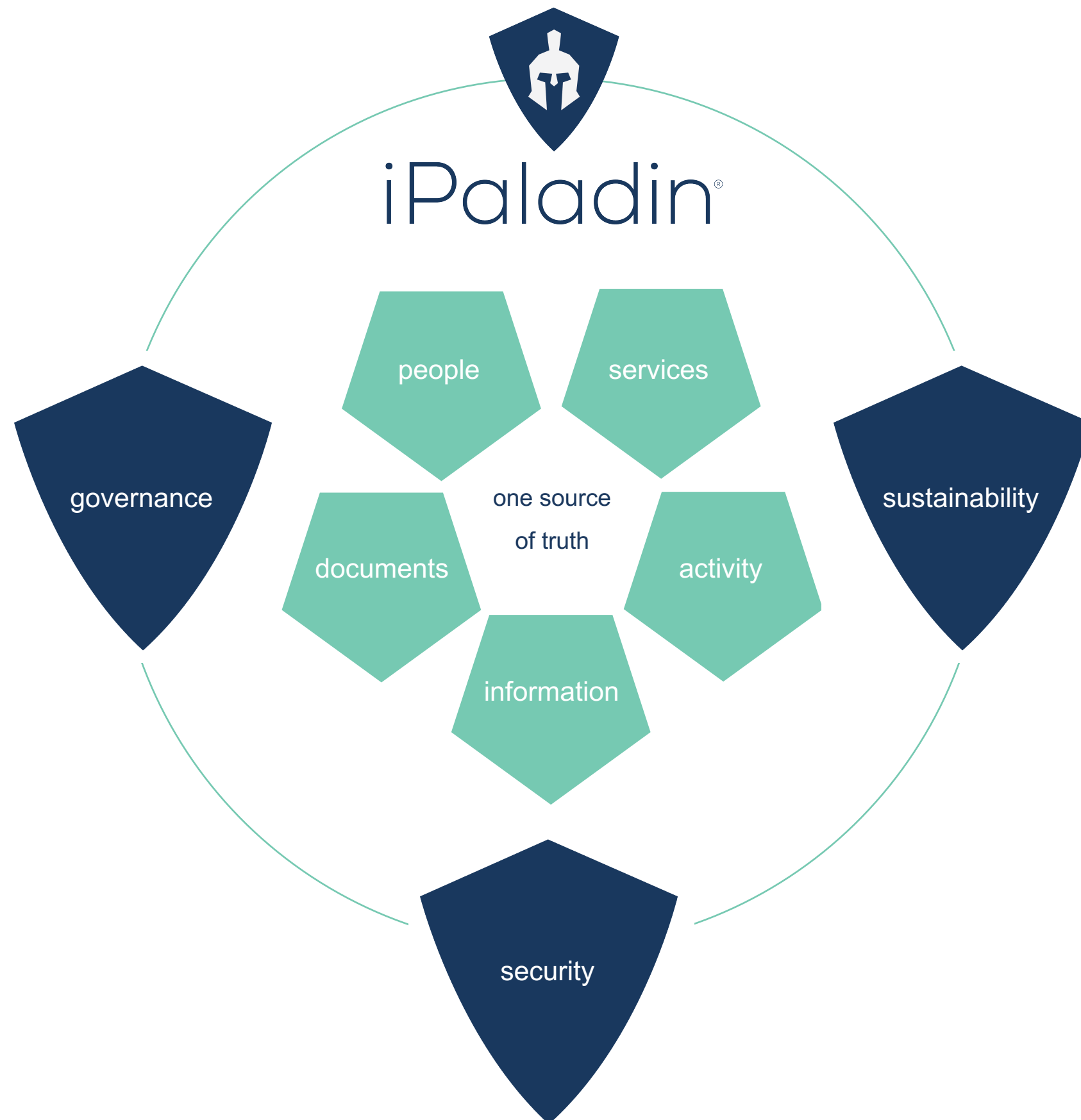
iPaladin

TABLE OF CONTENTS

03	iPaladin
04	family offices: the problem
05	iPaladin: the solution
06	key benefits
07	how it works
08	case studies

WHAT IS iPALADIN?

an evolutionary blockchain platform that orchestrates people, services, documents, activity and information around one source of truth



iPALADIN: THE DIGITAL FAMILY OFFICE

iPaladin was specifically designed for family office or private client professionals who need a centralized system to collaborate while relying on one source of truth. It is the world's first digital family office platform that structures intelligent information for quick consumption.

Battle-tested for over 10 years, iPaladin introduces new standards for virtual collaborative work inside a military-grade encrypted cloud environment. You will have an easy fast view to track the past, understand the present and prepare for the future in a way that saves time, money and stress at every stage of wealth management.

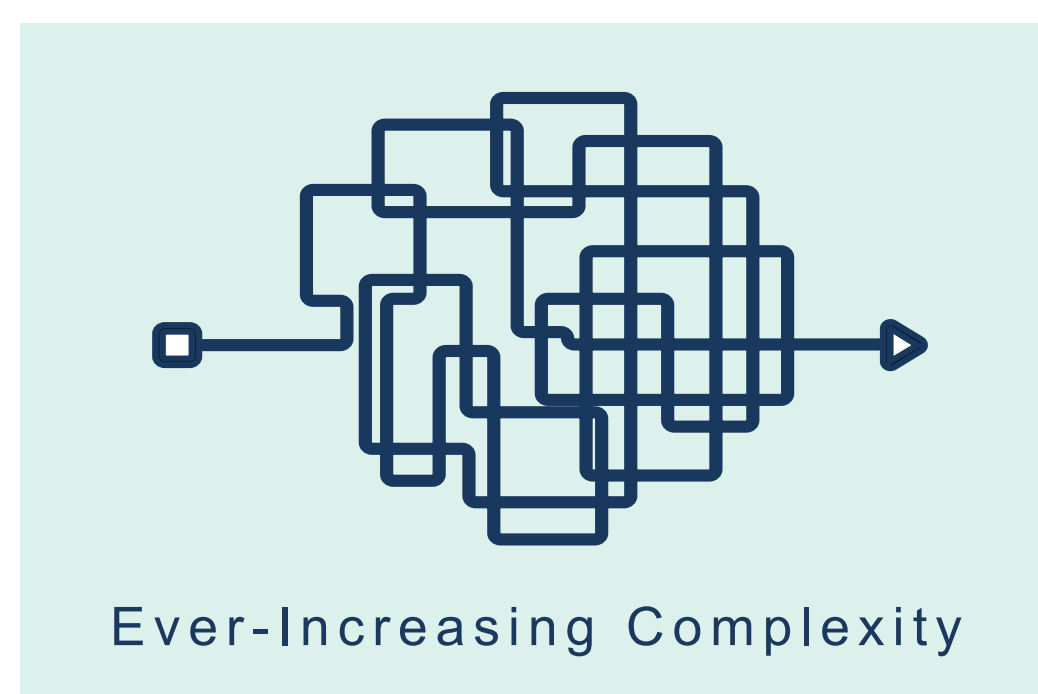
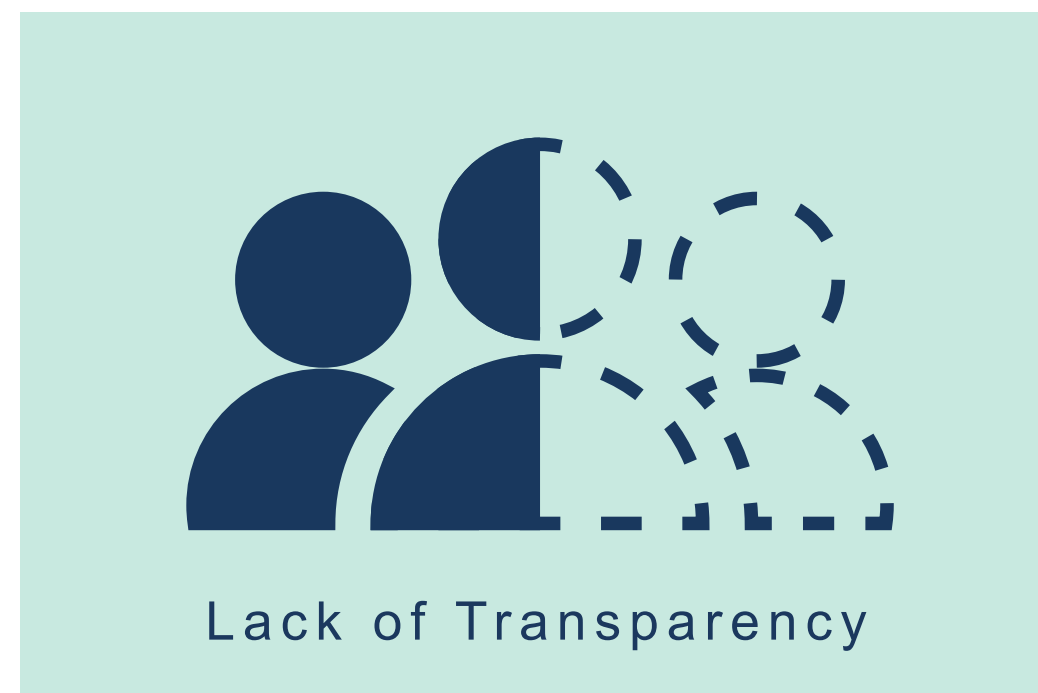
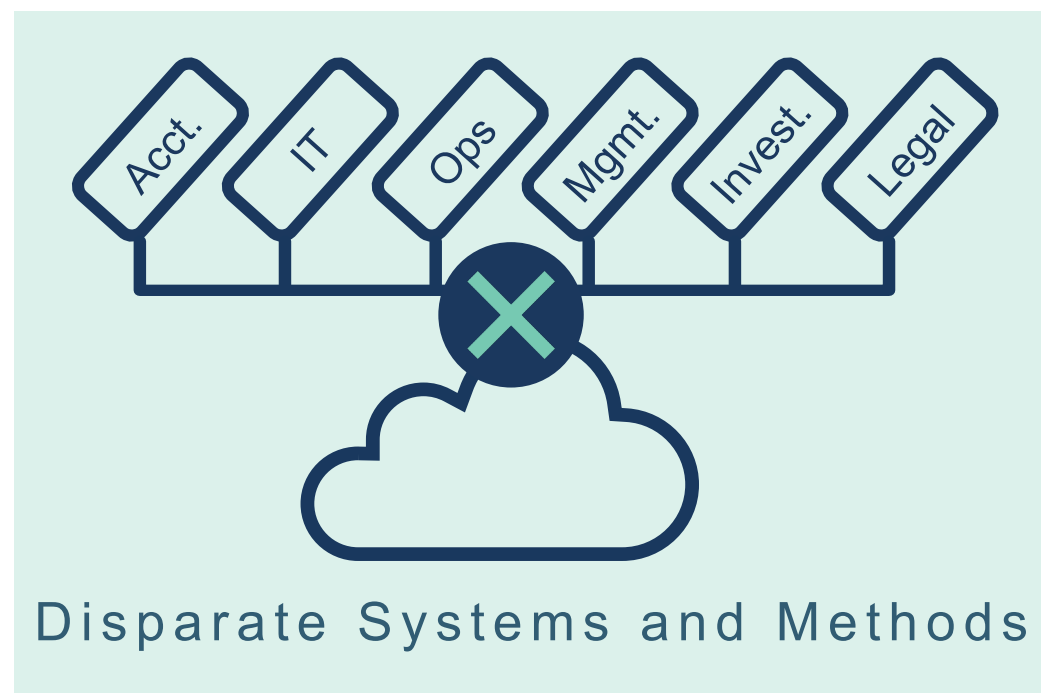
WHAT IS A DIGITAL FAMILY OFFICE?

iPaladin's Digital Family Office is a completely new information architecture using distributed ledger technology to organize, in one place, the work that is already occurring across a diverse multi-disciplinary family office network so that everyone is informed by one source of truth. Traditional professional services combined with advanced digital solutions are more powerful together than either alone.

FAMILY OFFICES: THE PROBLEM

As business operations and communications have digitized over the last 20 years, business transactions have become faster, more numerous, and more complex. The accountants, lawyers and other specialized professionals that serve the family office use digital platforms; accounting systems, online legal databases, and so on. But family office managers have no single system to help them administer the multitude of transactions, entities, assets, compliance, deadlines and decisions that they deal with. They typically operate with a patchwork of manual processes, documents, spreadsheets, calendar systems, and email.

This causes many problems:



+ statistics on families, generational growth, % that fall apart



iPALADIN: THE SOLUTION

CONNECT

every person that impacts a family's wealth - the family members, advisors and administrators, remote or on-site, employed or outsourced

INTEGRATE

finance, investments, tax, law, administration, lifestyle and family governance in one place

DIRECT ACCESS

every person has direct access to what's needed for their role, making digital collaboration, natural and intuitive, enabling everyone to work together in one accord

ORGANIZED

everyone's contributions are contextually organized in records for quick insight from one source of truth



progress from good to great simplifying information and work with context

	client portals <i>no metadata</i>	CRM and document management systems <i>simple metadata</i>	Knowledge blockchain <i>contextual metadata</i>	
centralized management system	none	limited	comprehensive and reliable	
Family governance	none	none	adaptive and role-based	
communication	none	limited	encrypted and captive	
document management	limited	yes	uniformly classified duplication control	
enterprise compliance	none	limited	automated end-to-end	
enterprise tasks	none	limited	semantic and contextual	
Collaboration and meetings	none	limited	contextual and integrated	
security	limited	limited	military-grade	
service and support	none	limited	family office experts	

accounting system

+

portfolio system

KEY BENEFITS

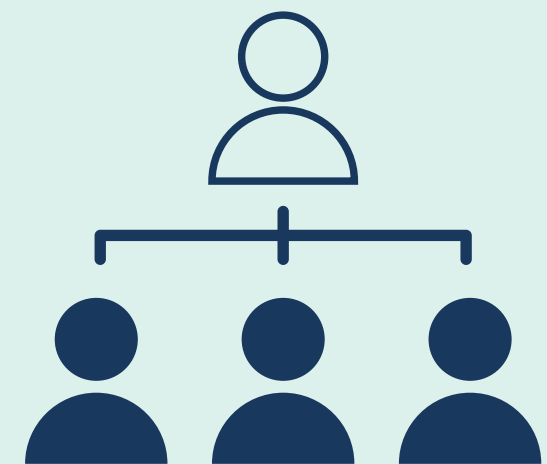


One Source of Truth

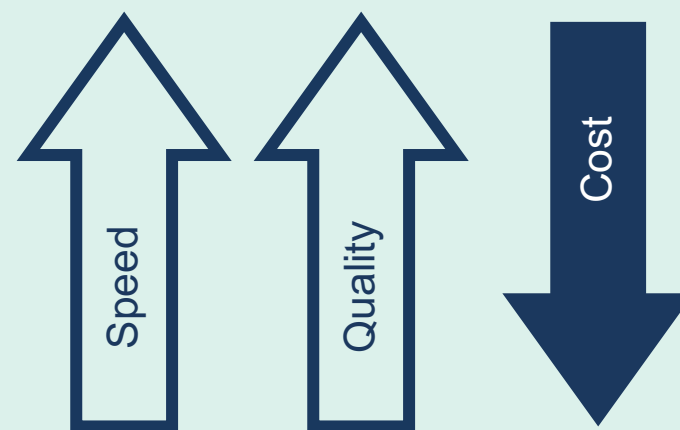


Privacy and Security

You will be able to do things you could not before,
while lowering costs and setting new, more
sustainable, family office standards



Transparency and
Accountability



Increased Staff Efficiency

connect your client's remote network of advisors in one place, including their legal, tax, finance, investment and specialty asset managers, insurance representatives and family governance consultants

experience a digital bird's eye view to strategically oversee the family client relationship

grant direct access to each advisor, per client authorization, so they have what's needed for their role to save time and reduce network effort

over the decades, as people in the client's network come and go, operations continue without disruption to the family's wealth initiatives

introduce the next generation into an organized and simplified digital version of their family's wealth history and sustainable future

HOW IT WORKS

containment, data ownership, and military-grade security

By centralizing the vital information and activity of a family office through provision of necessary context, iPaladin reduces risk, creates opportunity and preserves institutional knowledge for generations to come.

STRATEGIC

enable innovation and empower services to fuel growth

TRANSACTIONAL

automate business processes to reduce risk and cost

INFORMATIONAL

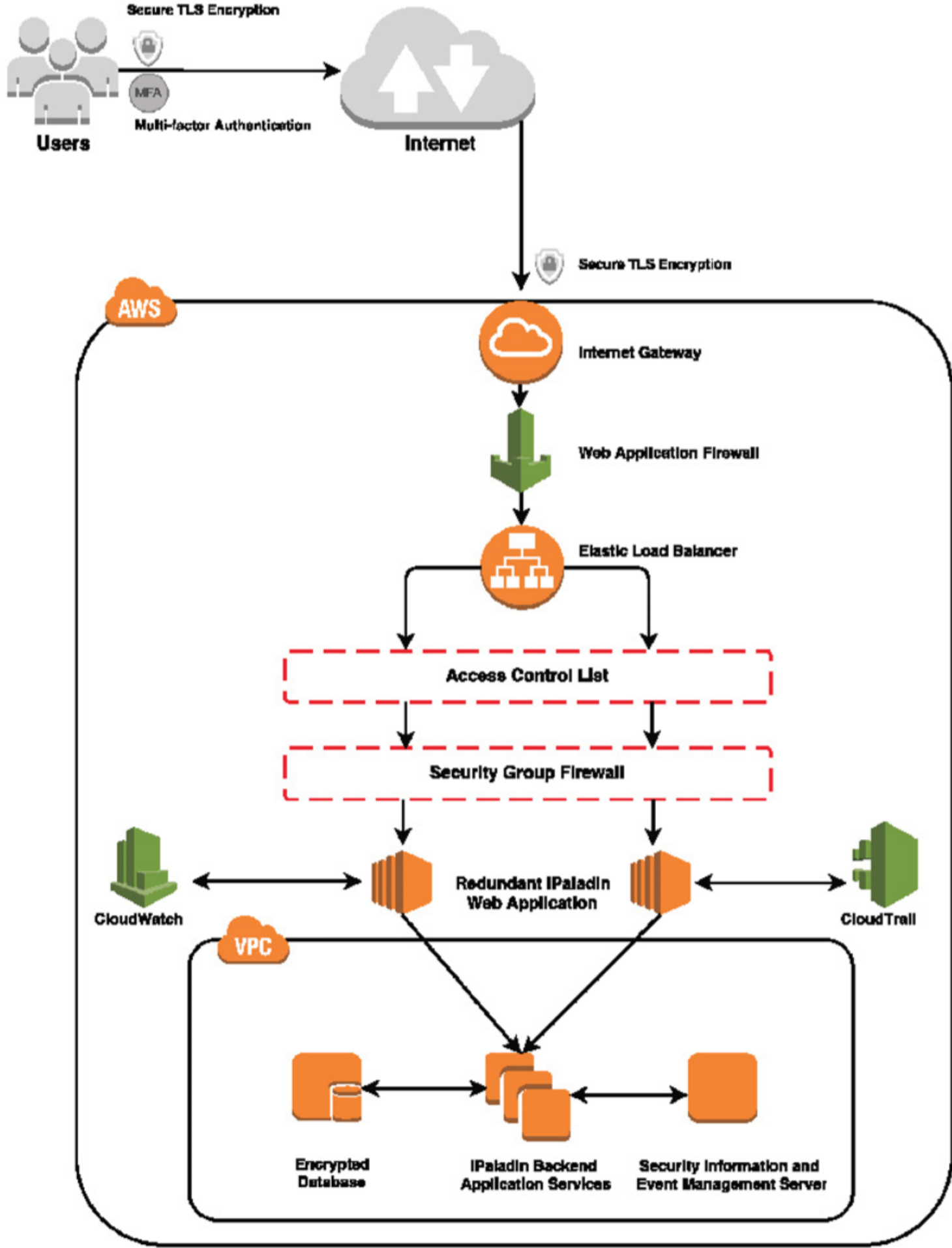
one source of truth empowering efficiency

INFRASTRUCTURE

single foundation orchestrating client services

control your own destiny

MILITARY-GRADE SECURITY



TESTIMONIALS

VISIONARY “BABY BOOMER” QUESTIONING SUSTAINABILITY AND CHANGING THE GAME

2010 | FOUNDER AND CEO OF GLOBAL BUSINESS



It was more difficult getting answers about my private wealth than my global company. We had many partnerships, trusts and a private foundation and multiple investments, mostly alternative. Financial reports were typically two quarters behind where the business was. With our private wealth, it was doubly important to get my children up to speed. My son was working with me and he needed to know where things stood. Implementing iPaladin changed the game. Today, on my morning walk, I wanted to look at some documents, and instead of getting my lawyer on the phone, I just pulled them up myself. iPaladin has improved my relationship with my professionals. Because I was prepared, they were able to work with me easier and faster. It's more satisfying for both of us. I am able to worry less and just let my office run in the background.



TESTIMONIALS

ASSUMING LEADERSHIP OF 2ND GENERATION FAMILY OFFICE

2018 | 40 YEAR OLD 2ND GENERATION FAMILY MEMBER

Was asked to take over the family office that had been using iPaladin's digital family office for eight years.



It's hard follow in the footsteps of a father who built a global company from boot-strapped efforts. iPaladin allowed me to access his decisions and values about growing the family's wealth and self-actualize into my own leadership style. It was like learning to bowl with bumper pads, which significantly shortened my typical learning curve. With every advisor's contributions recorded, it was easy to integrate into the family office network, understand everyone's role and find ways to add value.



TESTIMONIALS

FINDING PEACE OF MIND AS A 3RD GENERATION FAMILY OFFICE CEO

2019 | 31 YEAR OLD 3RD GENERATION FAMILY MEMBER

Assumed the role of family office CEO after spending 7 years inside of PWC's Private Client Tax Group. his family's wealth is vast and complex, filing over 300 tax returns. reviewing the office's work processes, he was immediately unnerved having no way to verify who was doing what.



I know everything is getting done but I wanted a bird's eye view to see and verify without having to ask. Also, we have had a lot of turnover, I want everything digitized so that if one person leaves, the next person step in and train themselves.



TESTIMONIALS

FUTURE PROOFING A 5TH GENERATION 100-YEAR-OLD FAMILY OFFICE

2020 | 35 YEAR OLD

Tasked with the responsibility of future-proofing a 5th generation family office that coordinated wealth operations for over 200 family members, none of whom had direct access to their family office. what began as a search for an accounting system, ended with an adoption of iPaladin's digital family office platform



I don't want 50 employees. I want 10 with the right tools.



The decision was made to outsource reporting so they no longer needed to buy an accounting system. Their smaller family office staff will have complete control over best-in-class selected external advisory firms.

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