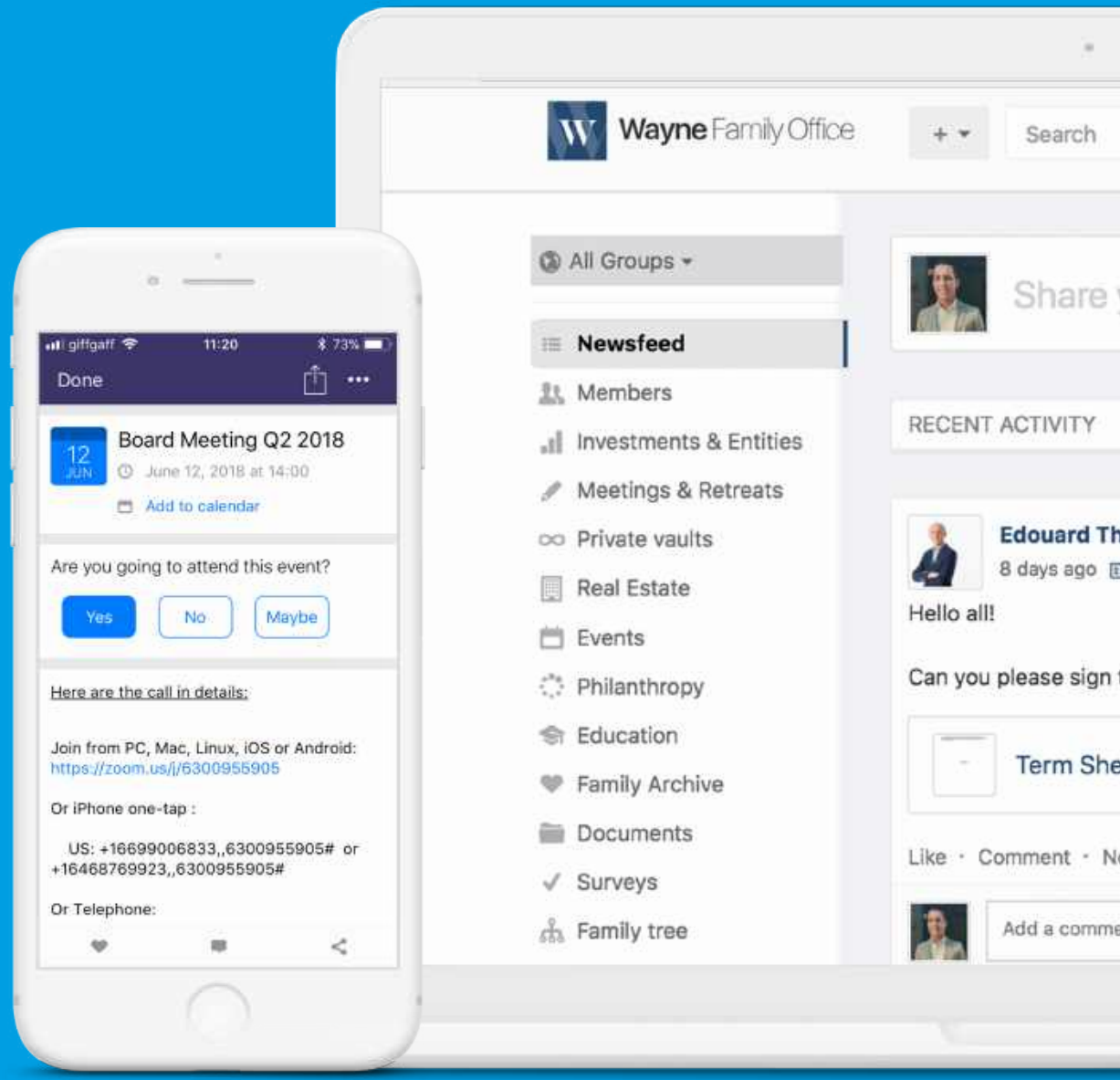
TRUSTED FAMILY

Secure technology for your family office

One platform with all the tools you need to manage meetings, workflows, sensitive information and communication.

ANYWHERE IN THE WORLD, 24/7



What are the challenges you face?

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

B Y F A M I L I E S F O R F A M I L I E S

We understand your challenges.

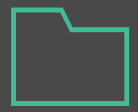
Our company was built by next generation members from two Belgian family offices. Trusted Family's solutions were their answer to increased family complexity.

TRUSTED FAMILY

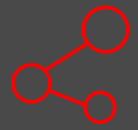
MANAGING INCREASED COMPLEXITY

We built a platform to help family offices manage complex information flows

Communication



Information Management



Meeting Management

WHY TRUSTED FAMILY?

More than just technology...

An advisory and support team

An advisory team that understands you

Support you can count on

Content ideas and templates to bring your platform to life

Webinars and educational resources

Client conferences and dinners

Networking opportunities with your peers

PROVEN SUCCESS

Over 140 family offices serve 5000 users through our platform every month

REFERENCES

Key numbers

34,210
SESSIONS PER MONTH

4000+
UNIQUE USERS PER MONTH

3,876
FILES UPLOADED PER MONTH

177
MEETINGS AND EVENTS ORGANIZED PER MONTH

A GLOBAL BRAND AND PRESENCE

3 Offices. 130+ clients in 25 countries. A team representing 7 nationalities and speaking eight languages.

S E C U R I T Y

Technology, people and processes.

Trusted technology, people and processes to manage sensitive information.

No commercial data usage

You will keep full ownership of your data.

A well-trained team

Because security starts with people, we have the processes and people in place to safeguard your data.

Highly secure data centers and servers

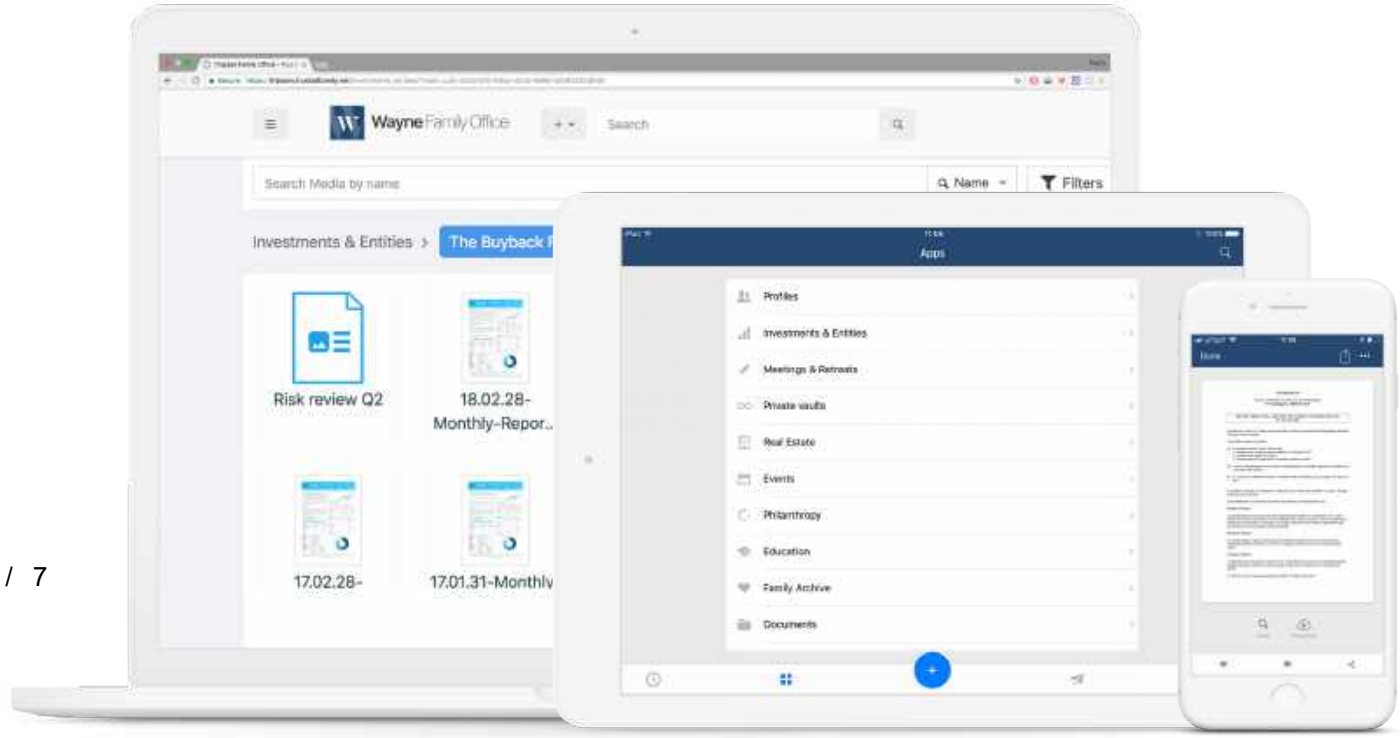
All your data and user activity is stored on servers with the latest encryption technology in data centers that are ISO27001 certified.

Third party audits

The platform is stress-tested by external security firms that try to penetrate our systems at least once a year.

One platform with all the tools you need to manage meetings, workflows, sensitive information and communication.

A N Y W H E R E I N T H E W O R L D , 2 4 / 7



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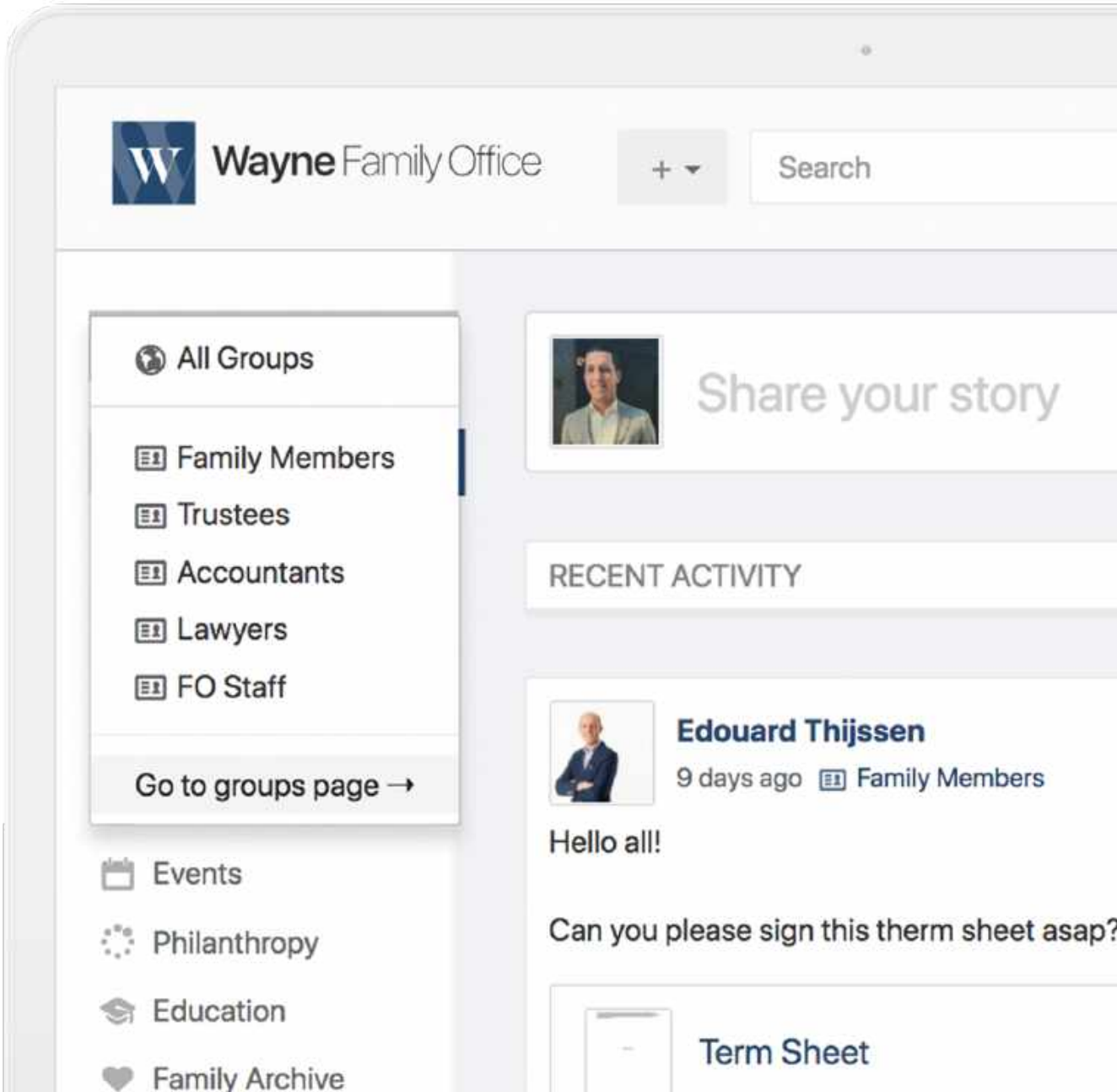
GROUPS &
PERMISSIONS

Set access permissions for different groups and individuals.

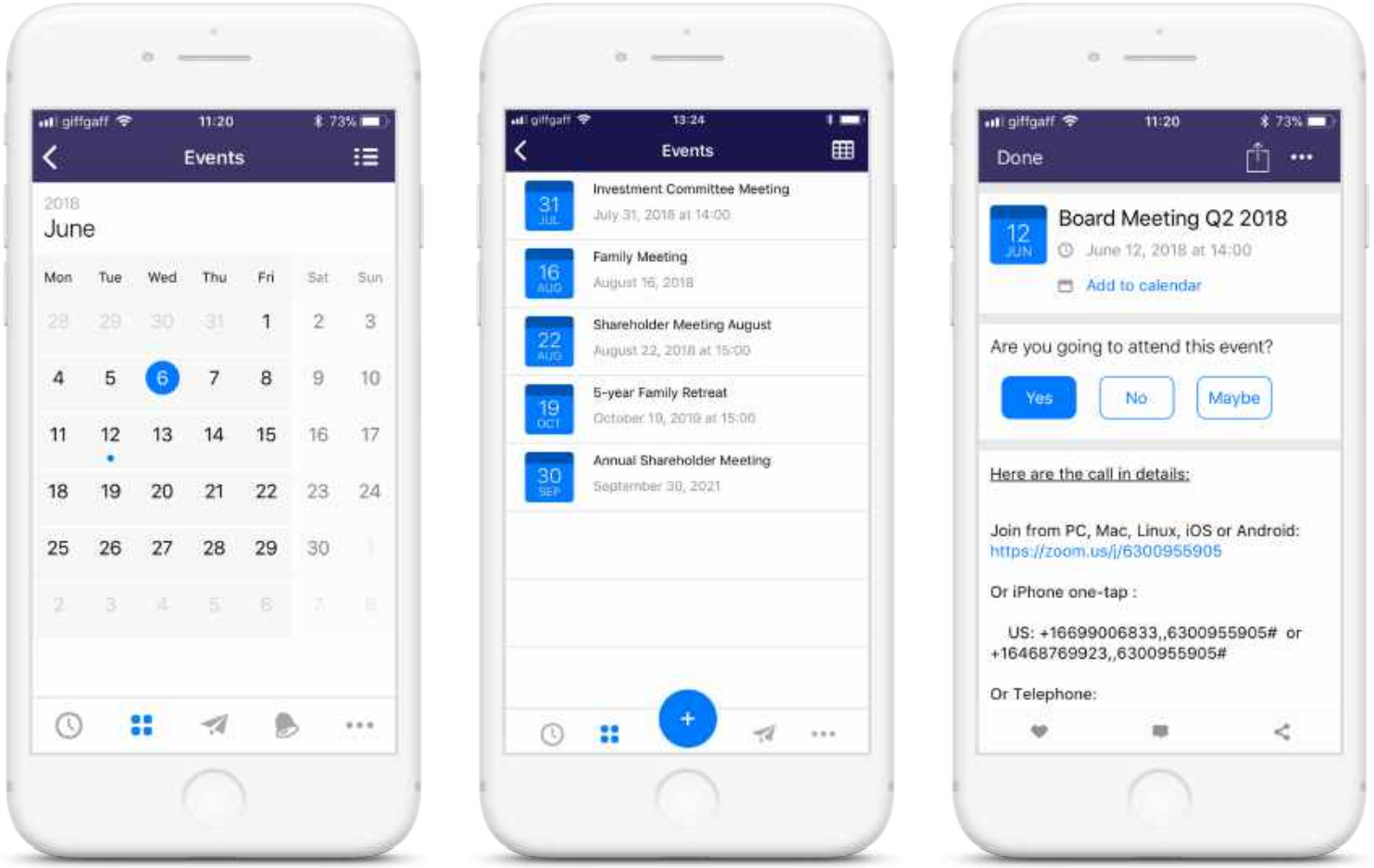
Recreate your governance structure in a digital environment. Create groups and permissions for your boards, committees and other working groups.



E V E N T S

Organize and manage your events and meetings.

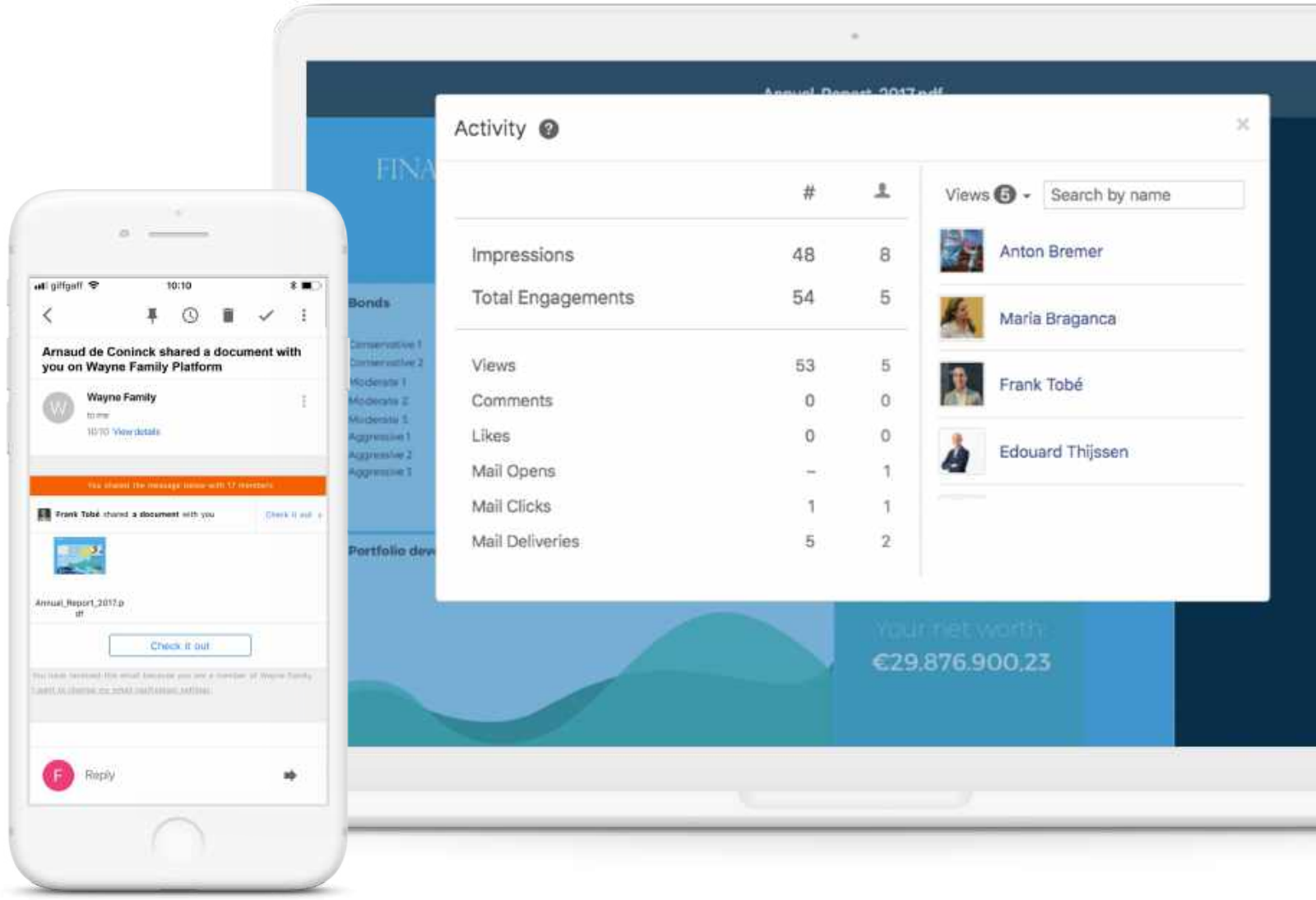
Create events and meetings, track attendance, add files and manage follow-up through our event apps.



B O A R D S

Manage your board online.

Track who has opened important documents, structure files and notify your board members through email.



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E L E C T R O N I C S I G N A T U R E S

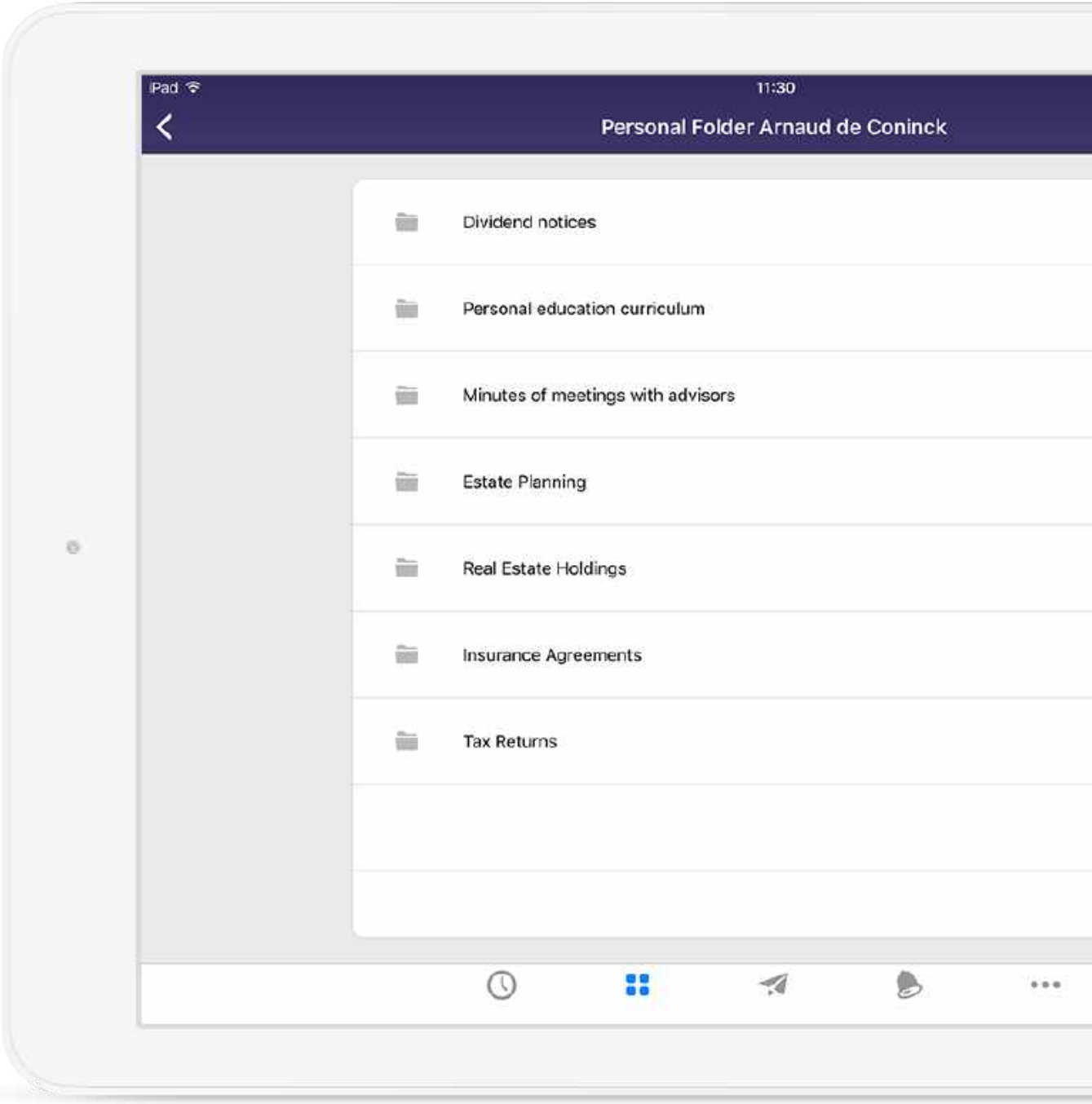
Sign documents and request signatures, quickly and easily.

We enable your staff, family and advisors to sign documents anywhere, anytime while maintaining the highest level of data security.

PRIVATE VAULTS

Create private vaults for individual family members.

Securely share and store information for individual family members and make sure it is only visible to them.



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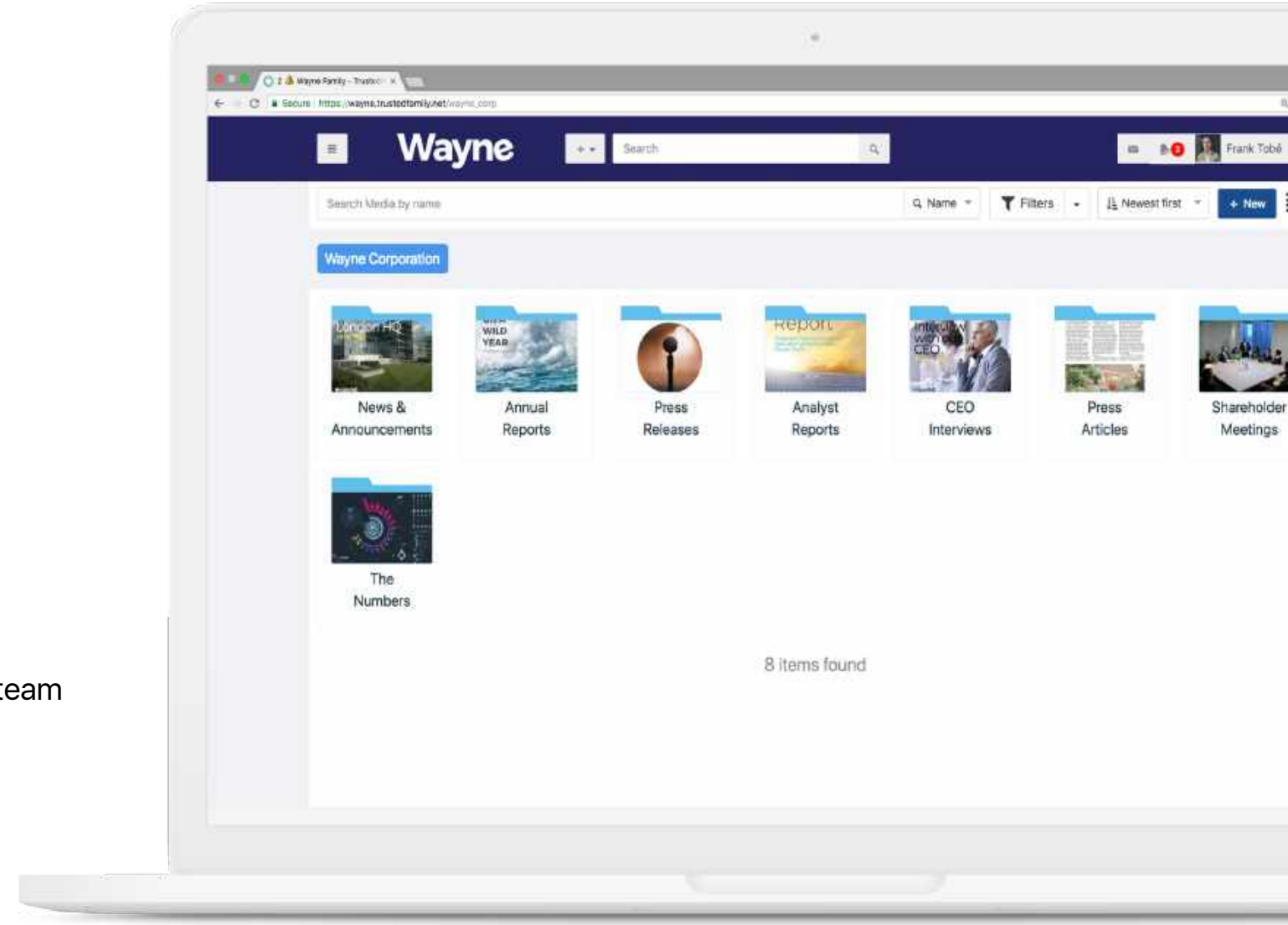
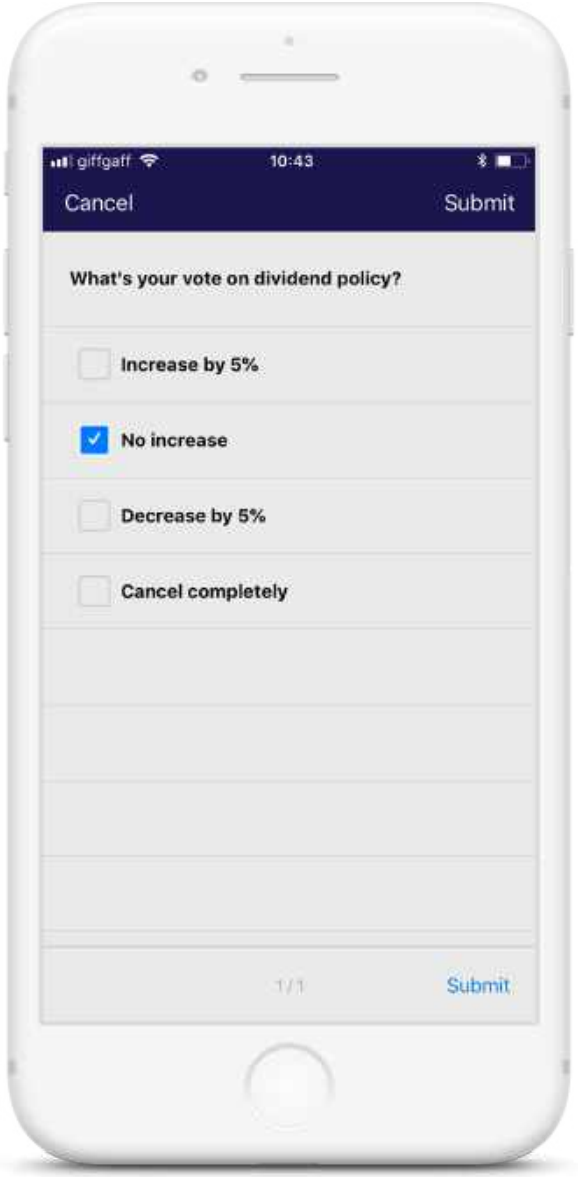
A R C H I V I N G

Organize your information in a way that’s best for you

Create and manage folder structures you and your team can rely on.



TRUSTED FAMILY



S U R V E Y S

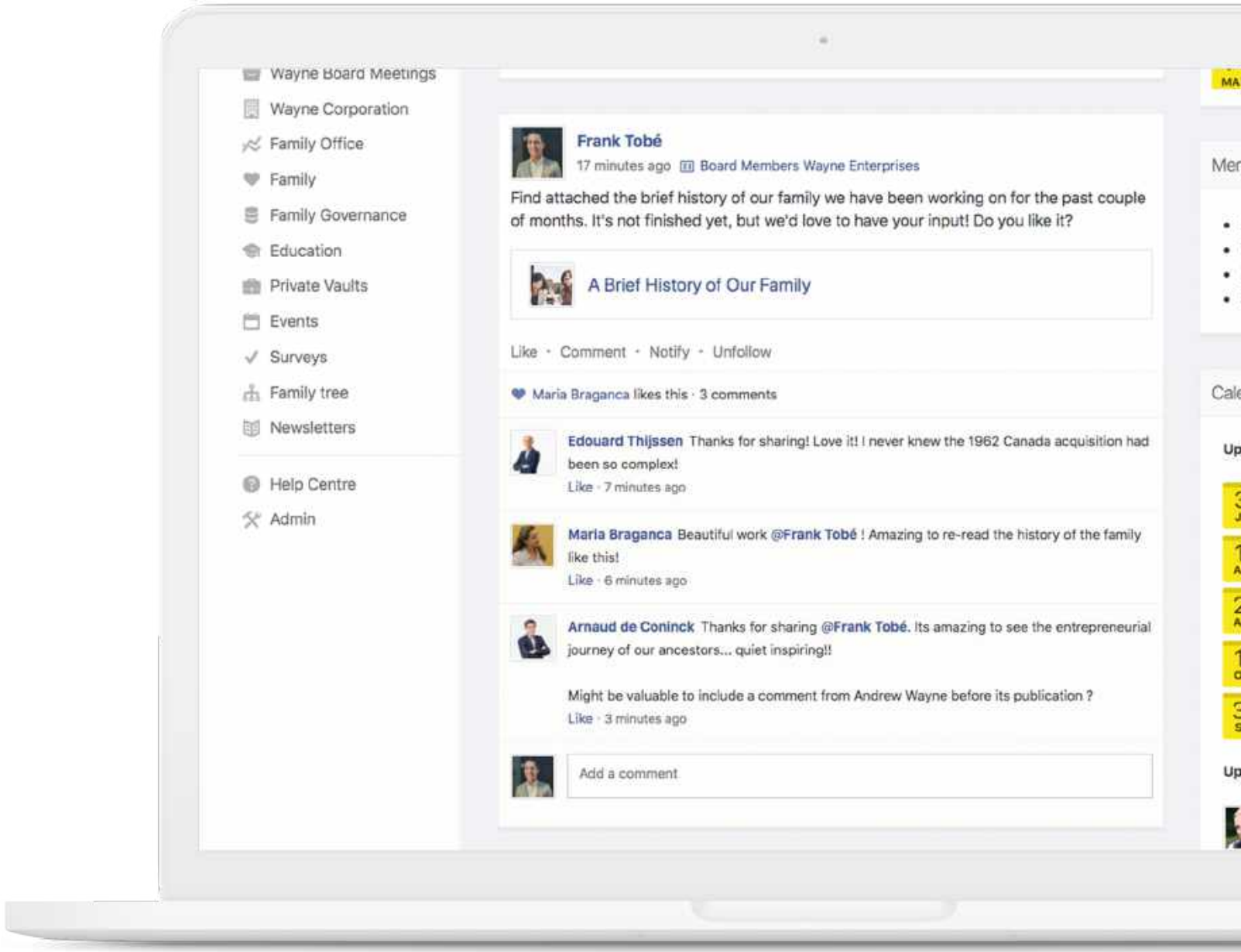
Create and take surveys across your groups.

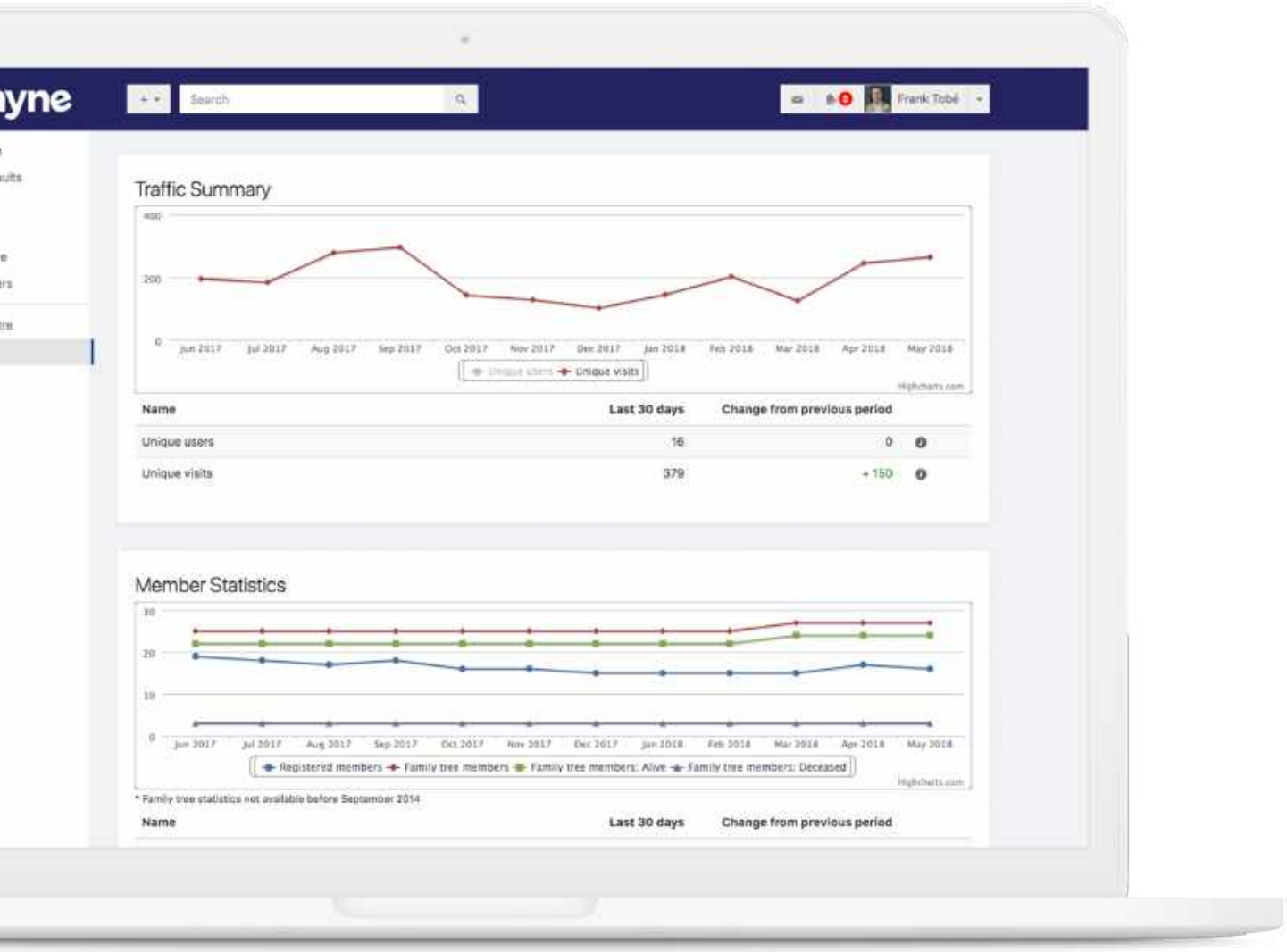
Administrators can easily create surveys on the platform. Adjusting answer-formats and sharing them with all or just a select part of the platform members.

NEWSFEED

Facilitate interactions through the newsfeed

Bring your family together in a joint basecamp that allows everybody to contribute, share, like and comment.





STATISTICS

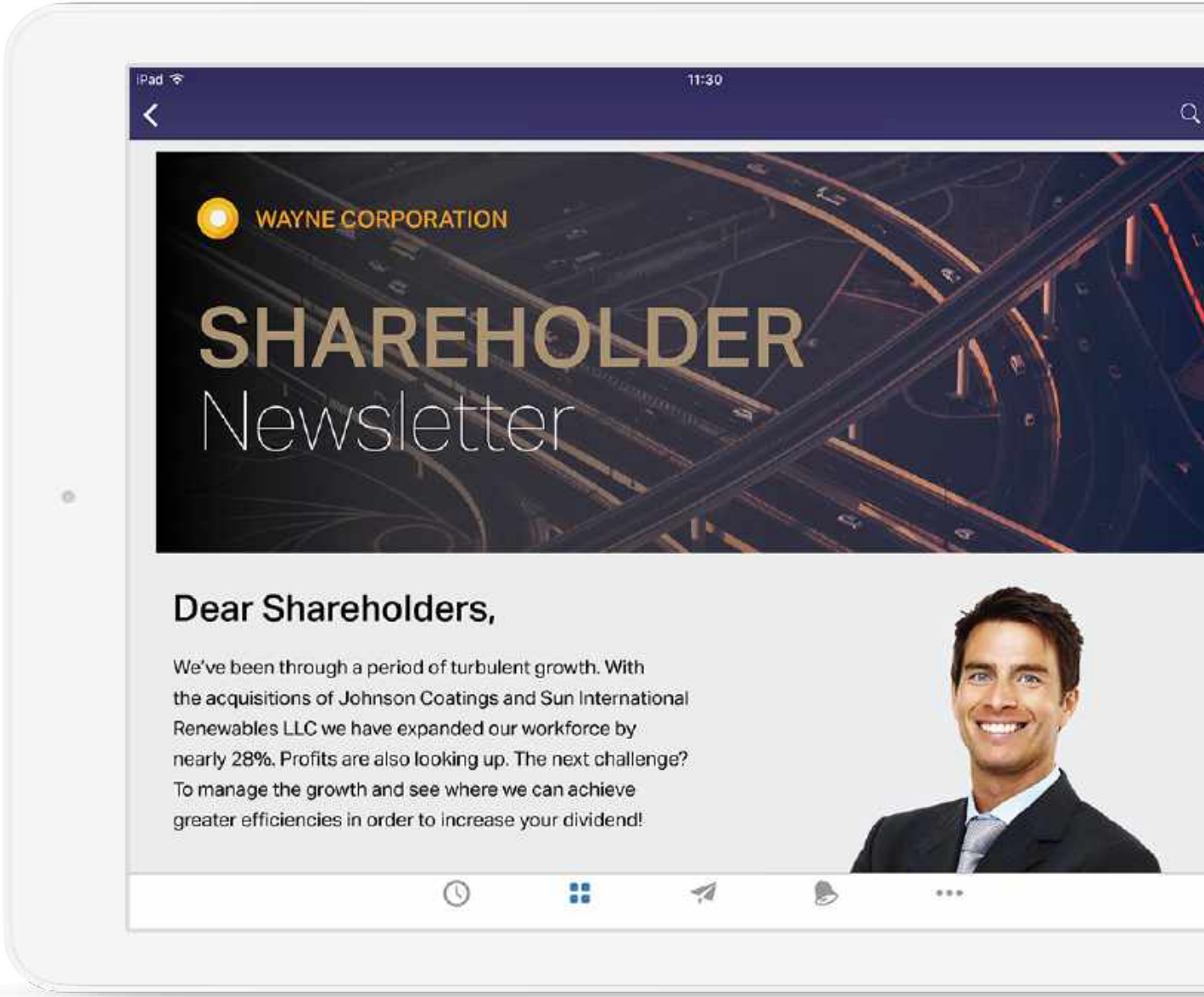
Track and report on user engagement

Find out what works or who has seen that one important document. Through in depth statistics, the platform enables you to stay on the pulse of your community's interactions.

NEWSLETTERS

Easily create and send newsletters

With our easy-to-use drag and drop newsletter editor, anybody can now create good looking newsletters to email to shareholders and/or family members.



Would you like to discuss this further?

contact@trustedfamily.net
http://www.trustedfamily.net

Get in touch, and we can arrange a short online demo to show you how the platform works and to discuss your needs.