

Welcome!

Family Office & Ecosystem Platform

Introduction and Demo



WAY2B1

Who we are



Founded in 2015 in the Bay Area with 25 talented staff in North America & Europe.

Meet our Co-Founders:



As a well respected luminary in the family office market, **Wayne Osborne, CEO**, brings 30+ years experience helping ultra high net worth families manage their lives.



Casey Ketterling, CTO, brings 15+ years of technical expertise to Way2B1 from high growth Silicon Valley startups (Prosper, Palantir) and created the sophisticated data management and analysis software used within the Way2B1 platform.



Why We Exist



Our **vision** is to simplify the complex life of families.

Our **mission** is to enable *high net worth individuals (HNW) and families* to better manage their complex life by providing a secure, private, and efficient operating environment that also connects them with their *ecosystem* service providers and *each other*.



The number of UHNW (ultra high net worth) individuals will grow by **39%** from 2019-2024¹



HNW individuals grew by **6%** in 2019²



The number of Family Offices grew worldwide by **10x** from 2008-2018³



41% growth in North American Family Offices, 2017 - 2019⁴

¹ Source: Credit Suisse Research Institute 2019 Global Wealth Report

² Source: <https://www.theguardian.com/news/2020/mar/04/the-super-rich-another-31000-people-join-the-ultra-wealthy-elite>

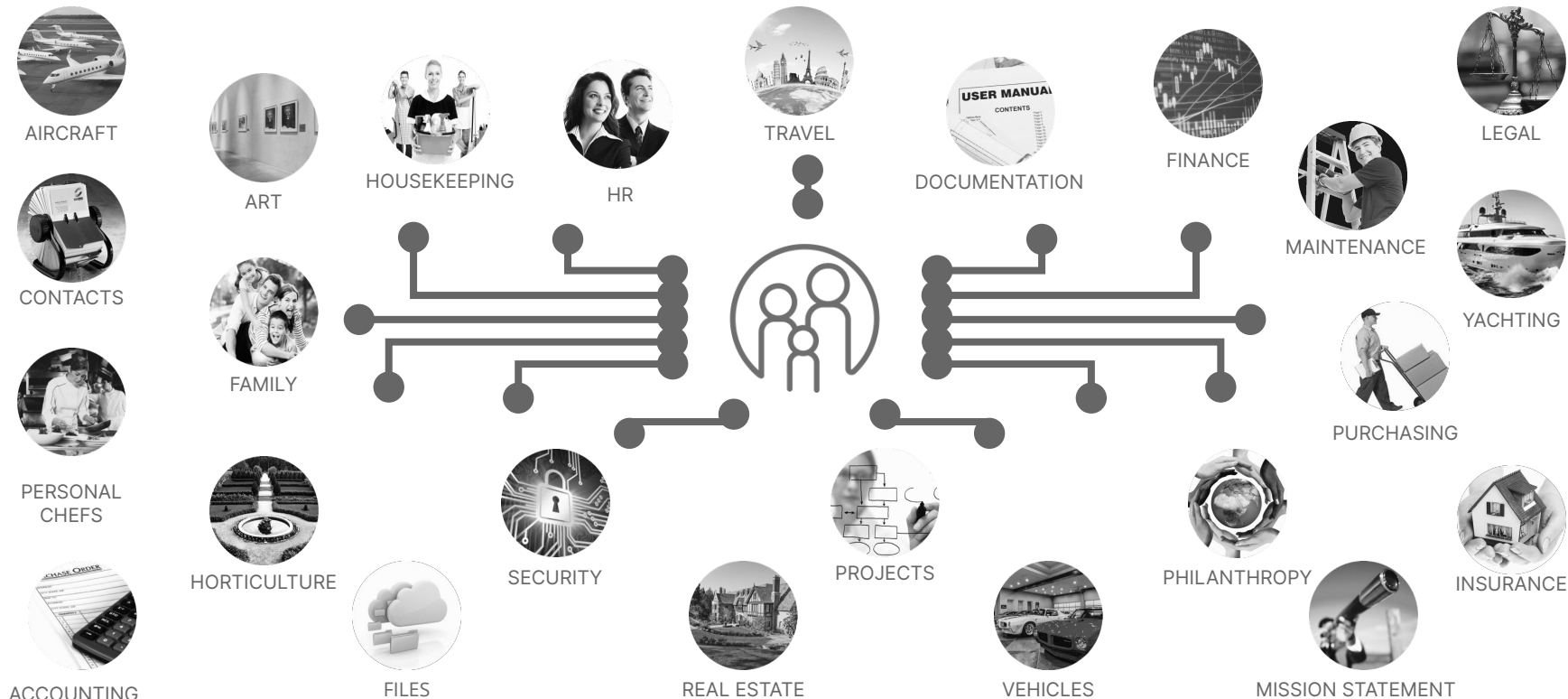
³ Source: <https://www.forbes.com/sites/francoisbotha/2018/12/17/the-rise-of-the-family-office-where-do-they-go-beyond-2019/>

⁴ Source: <http://www.campdenfb.com/article/global-family-office-growth-soars-manages-59-trillion>

It's Complex



The world of high net worth individuals and families is complex and hard to manage.



The Problem



As wealth increases, time and the ability to effectively manage aspects of your life decreases.



Lost control



Limited time



Lack of continuity when staff leave



Multiple staff & service providers to manage



A family office helps solve some pain points but **no one technology** exists to help a family office solve all the complex needs of HNW individuals.



Limited time with family causes misalignment & decision/approval issues



No industry best practices is costly



Lack of data security expertise



Inadequate technology & skills

The Solution



A platform for individuals and families to access their world with a single username and password.



Source

Interactive central repository for managing assets



Greenlight

Decision and approval workflow



FixIt

Project and task management

Future Roadmap

- Ecosystem service provider development
- Networking & co-investing capabilities
- Weekly principal update report
- Rich templates & life dashboard



WAY2B1

Certified SOC 2 Type 2 Compliant

End-to-End Encryption

SAML/SSO

Single Tenant Architecture



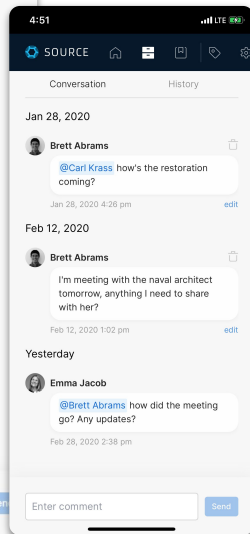
The Source application interface displays a dashboard for a project named 'Aspen'. The left sidebar lists various domains and categories, including Estate Planning, Family, Food, Foundations, Hall of Fame, Human Resources, Insurance, Investments, Legal, Legal Entities, Maritime, Overview, People, Projects, Properties, and United States. The main content area features a large image of a mountain landscape and a profile card for 'Aspen' with a photo and a '+8' indicator. Below this, there are several widgets: 'Specs' (a table with columns 'Key' and 'Value'), 'Clock' (displaying Mountain Time and Copenhagen time), 'Fixit' (a list of tasks with 'Open' and 'Closed' filters), and 'Greenlight' (a list of requests with 'Configure' and 'APPROVED' status). The right sidebar shows a conversation history with messages from Menna Rashwan and Brett Abrams, dated Nov 07, 2019, and Feb 07, 2020.

Key	Value
Owner	Rockies LLC
Address	789 Mountain Road
Type	Cabin
Bedrooms	7
Bathrooms	9.5

Task	Status	Created By	Updated On
Weekly Pool Maintenance	Open	Carl Krass	Feb 07, 2020
Weekly Pool Maintenance	Open	Carl Krass	Jan 31, 2020

Request	Status	Amount	Unit
Purchase sofa @ Aspen	EXPIRED	5,500.00	USD
New conference table	APPROVED	1,500.00	GBP

An interactive central repository for managing assets and **accessing knowledge** in real-time from anywhere in the world.





The screenshot displays the Greenlight web application interface. At the top, the navigation bar includes the Greenlight logo, a home icon, a menu icon, and a '+ New' button. The user profile 'Brett Abrams' is visible in the top right corner.

The main content area shows an 'INVESTMENT REQUEST' for 'Woodstar Global Opportunity Fund' with a request ID of 398. A progress indicator shows 40% completion, with 3,000,000.00 USD remaining. A green 'APPROVED' button is visible.

A dropdown menu is open, showing categories: Expenditure, Food, HR, Investment, Legal, Philanthropy (highlighted), Project, and Travel.

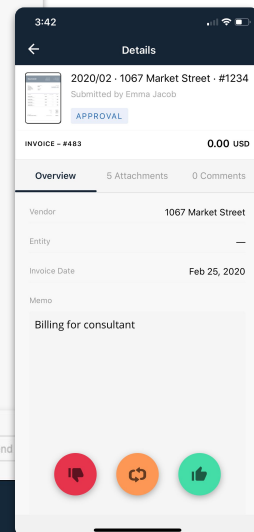
The 'Overview' tab is active, displaying the 'Amount Requested' as 5,000,000.00 USD. Below this, it lists 'Shared Users' (4 users), 'Vendor' (Woodstar Global Opportunity...), 'Entity' (2003 Irrev. Trust), 'Requestor' (Brett Abrams), 'Requested On' (Oct 16, 2019), and 'Request Expires' (Feb 1, 2022).

A line graph titled 'APPROVED ITEMS' shows the amount requested over time, with a peak of 5,000,000.00 USD. The x-axis is labeled 'EXPENSE' and the y-axis is labeled 'AMOUNT'.

The 'Accounting Transactions' section shows an 'EXPENSE' entry with details: Expense No: 1, Vendor: Woodstar Global Opportunity Fund XI, LP, Legal Entity: 2003 Irrev. Trust, Uploaded by: Brett Abrams, and Bill Date: Oct 15, 2017. The amount is 100,000.00 USD, and the status is 'APPROVED'.

The 'Comments' tab is active, showing a conversation between Emma Jacob, Tarang Gala, and Carina Tran. Emma Jacob's comment reads: 'I'm meeting with Woodstar next week for a performance update.' Tarang Gala's comment reads: 'Excellent, Emma. Looking forward to it!'. Carina Tran's comment reads: '@Carl Krass What are the next steps?'.

A **decision**, **expense tracking** and **approval** workflow for a family office and ecosystem providers.





FIXIT
+ New

Filters

Status All

62 Results

Recently Updated ↑

No Location

Projector screen is blurry

No Location

Teak Deck Needs Sanding

(property hidden)

Door is blocked

Chateau Grimaldi

Rotate the tires

Continental GT

Hot water is broken

869 Walker A... , Bathroom

Switch the comforters to down

Shanghai Penthouse, Lobby

Sliding doors will not close

Columbia Estate, Master Bedroo...

Lightbulb is out

Shanghai Penthou...

TV Needs to be Replaced

Columbia Estate, Master Bedroo...

Garage Door Damaged

500 West Street

VERIFIED

IN PROGRESS

VERIFIED

TO DO

IN PROGRESS

VERIFIED

VERIFIED

VERIFIED

VERIFIED

Task 63

Teak Deck Needs Sanding

VERIFIED

High Priority

Impacts Family

Attachments

Location

(property hidden)

Description

Assigned to

Emma Jacob

Schedule

Due Thursday, August 29

Does not repeat

Shared with

11 people

San Francisco Team 9

Santa Fe 4

Comments

Links

Checklist

Brett Abrams

October 22, 2019 8:24 am

Emma, Carl is out so I am assigning this to you. Thank you!

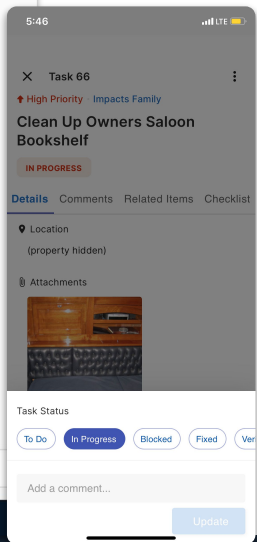
Brett Abrams

October 22, 2019 8:25 am

Sanding is complete.

Add a comment...

A project and task management tool to **assign, track and report** repairs and projects





Collecting and connecting valuable family data requires **industry leading** safeguards and **relentless** vigilance



Data Security

- SSL - Way2B1 uses Transport Layer Security (TLS) encryption (also known as HTTPS) for all transmitted data.
- Two-factor Authentication - All Way2B1 applications utilize two-factor authentication.
- End to End Encryption
- Security and Penetration Testing - Software is tested by 3rd party security consultants.



Data Backup

- Daily Backup - All data stored on the Way2B1 platform will be backed up daily and stored with encryption. Monthly, we will support transferring data backup assets to an on-premise location of your choosing. Data backup will be conducted in accordance with the Security Plan.
- Data Encryption - Backup of all data stored within the Way2B1 platform are stored with AES 256 encryption.



Secure Cloud

- Source and Applications are hosted using logically isolated and encrypted servers.
- Each family instance is protected by a customized network firewall.
- VPN Security - Clients access instances using Virtual Private Networks.



Want to know more?
Request a copy of our
[Security White Paper](#)

Way2B1 Pricing Packages



MOST POPULAR!

ENTRY

Entry includes everything a family office needs to get started:

- Up to 5 users (principal, family, vendors, etc.)
- 25+ GB of file storage (documents, photos and more)
- iOS and Android mobile apps

\$150

*monthly

BASE

Base includes everything in Entry, and:

- Up to 25 users (principal, family, vendors, etc.)
- 50+ GB of file storage (documents, photos and more)
- iOS and Android mobile apps

\$375

*monthly

PRO

Pro includes everything in Base, and:

- Up to 50 users (principal, family, vendors, etc.)
- 100+ GB of file storage (documents, photos and more)
- iOS and Android mobile apps
- 1+ integrations

\$995

*monthly

Enterprise

For organizations with advanced administrative, security, and collaborative needs:

- 100+ users
- 150+ GB of file storage (documents, photos and more)
- iOS and Android mobile apps
- Unlimited integrations

\$1,950

*monthly

What our clients are saying...



“Greenlight has proven to be a fantastic database, giving us ultimate control over how we receive, analyze and process all of our purchase requests. It offers an entirely integrated experience with QuickBooks and **has increased our productivity tenfold. I am especially impressed with their customer service team who are always very happy to offer training, advice and eager to listen to our feedback.** They are constantly improving and exceeding all of our expectations.”

Purser, M/Y Barbara

“Greenlight enforces compliance for purchase orders and approval process over several steps in our office. It enables incoming invoices to be released more quickly, and the accounting department can process the paperless document immediately, without time-consuming checking of facts, resulting in payments being triggered more quickly. As a result, **discount periods are hardly exceeded and we achieve a high level of satisfaction among suppliers. The clear presentation of all open processes also makes creating the cash forecast much easier and more precise.**”

Jürgen Niedernhuber, Executive Director, Pari Group

“I had the pleasure of using Way2B1 in my previous employment and found **it to be streamlined and efficient.** We feel it would be an effective and systematic element to the operations of my new family office’s yacht program.”

Nora Edgington, Purser, Large Yacht



What our clients are saying...



“Greenlight has significantly improved our productivity by providing an easy overview of all purchase requests and current orders across multiple departments. **The approval process delivers a traceable history creating accountability and clarity.** The integration with QBO allows the purser to have confidence in monitoring outgoings and ensuring there are no outstanding funds. A highly functional and customisable platform – **I don’t know how we managed without it!**”

Purser, M/Y Nirvana

“From my perspective as a Greenlight user, **the principal benefit has been the efficiencies** it has brought to my decision making, the speed in which now I can receive and yes or no answer on a question can **be hours now, not days or weeks.** Strategically speaking a clear “no” answer is as important as a yes, and if it comes with comments as to why it was rejected - We can change our course with haste and adjust future requests and actions. **The speed with which this can take place compared to the old system of emails sitting in inbox is superior in about every way.**”

Todd Leech, Captain, M/Y BOLD



Contact carl@way2b1.com to learn more

