DOES YOUR FAMILY OFFICE Cultivate Good STEWARDSHIP?

Do your clients get real-time access and visibility with role access to their financial records and transfers?

Problems Faced
in Managing a Family Office

Multiple Spreadsheets

Consolidating 100's of Entities

No Real-Time Visibility or Access to Financial Data

Copious Charts of Accounts

Using a non AICPA Recognized Solution

You spend too much time and money on things that don't drive your business forward

Pain Points
You Experience

Limited Growth:
Monthly reporting takes 10's or 100's of hours

Risk:
Impossible to backtrack purpose for certain decisions

Cost:
Switching from Using Non-GAAP Compliant solutions

Time:
Multiple entities and databases

Assure Good Stewardship
Building Trust for Your Clients & Their Teams

Record transfers once between funds or investors.

Personal and business financials are never connected.

Offer efficiency and real-time role-based access.

Shared dimensional chart of accounts.

Track and see where money is recorded.

Choose full GAAP compliance.

Save time and money!
Sage Intacct is the Only Profitable Solution for Family Office & Real Estate Investment

Explore how we saved one client $1M in our deep dive blog post

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