



**Deloitte.**  
Private

## Deloitte family office services

Differentiated capabilities to serve  
family operations

**SECOND EDITION**



# OPERATIONS AND RISK MITIGATION

## STRATEGIES FOR A RESILIENT AND FUTURE-READY FAMILY OFFICE

In today's complex business environment, managing operations and mitigating risk can be a real challenge for family offices. Deloitte's end-to-end operations services can help your family office function efficiently, freeing you to focus on larger strategic issues. At the same time, our Enterprise Risk Management and Cyber & Strategic Risk services can help you identify and manage potential risks and foster resiliency of office operations.

# Legal business services

## EFFICIENCY, REDEFINED

Every family office operates as its own distinct business. And just like many organizations, success often hinges on efficient day-to-day management and execution. Deloitte's Legal Business Services team can help your family office function like a well-oiled machine by taking on many of the daily essentials—from contract and vendor analysis, procurement, and system integration oversight, to staffing training, policy creation and background checks—so you can stay focused on the bigger picture.



## OUR SERVICES

### Technology integration

Implement contract life cycle management systems and provide oversight for advanced systems streamlining contract and invoice management.

### Data architecture

Oversee the integration and management of data systems implementation, facilitating efficient data flow and accessibility.

### Operational modernization

Modernize and enhance traditional operational processes, analyzing whether they comply with contemporary standards.

### Policy development

Craft and enforce, in accordance with the playbook, detailed policies for contracts, vendor engagement, and vendor management.

### Procurement management

Introduce procurement strategies, source-to-pay solutions, and e-business modules to facilitate cost savings and management of future spend.

### Contract analysis

Draft, review, execute, renew, and maintain any master service agreement, statement of work, or non-disclosure agreement under the guidance of the family office.

### Document management

Centralize and disseminate key documents, including trusts, contracts, business licenses, and family correspondence.

### Administrative efficiency

Efficiently navigate administrative tasks, providing a smooth operational backdrop for the family office.

### Legal entity management

Manage business licenses, corporate secretarial solicitation registrations, and annual compliance filings for legal entities under the guidance of the family office.

### Transactional support

Provide operational support by managing day-to-day contract and reporting duties to drive strategic operational decisions.

# Controllership services

## RESPONSIVE, TECHNOLOGY-ENABLED FINANCIAL AND OPERATIONAL MANAGEMENT FOR THE MODERN FAMILY OFFICE

Whether long-established, newly formed, or in the design stage, the modern family office faces an array of complexities. Deloitte's Family Office Controllership Group provides clear guidance for helping clients manage these challenges, from prudently handling operational costs and the ongoing imperative for digital transformation, to tackling staff shortages, continuity challenges, and increased demands for responsiveness around the clock. We start by investing time to learn about your specific circumstances and situation, then apply Deloitte's talent resources, sophisticated accounting capabilities, and effective technology tailored for family offices—including for sophisticated investment portfolios, operating businesses, and private equity and real estate holdings.

Our approach positions us to be your financial and accounting service advisor. By combining a deep commitment to confidentiality with local market insight, broad market experience, and Deloitte's vast network of professionals, we cater to the different circumstances and dynamics of multi-generational family offices and the families they serve.



## OUR SERVICES

# 01

### Tailored accounting and services

- Assistance with managing day-to-day bookkeeping/accounting through technological capabilities—bill payment, cash management, journal entries, bank and balance sheet reconciliations, custody account management, and more.
- Prepare a full set of financial statements and other reporting to provide a broad view of investments and activities.
- Advise on budget and planning services to better manage spend against client-approved budgets.
- Automate offline analyses and build customized reporting deliverables to gain valuable insights into investment performance and advise on managing risk.
- Design and implement reporting deliverables, such as real-time dashboards, to track and manage assets and liabilities, activities, and other vital information.
- Coordinate with the family office's tax professionals, whether in-house or third-party providers.

# 02

### Lifestyle management

- Track bills and prepare payment instructions for authorization.
- Budgeting and financial planning.

# 03

### Technology enablement

- Evaluate technology vendor selection to identify systems fit-for-purpose of family office requirements.
- Implement and deploy modernized technology solutions that are fit-for-purpose, inclusive of training and change management for end users.
- Utilize outsourced technology maintenance and administration services.

# 04

### Oversight, governance, risk management and fraud detection/protection

- Oversee external fund administration and reporting.
- Enhance business processes and document organizational structure, roles, policies and procedures.
- Conduct internal control gap analyses and design supplemental/mitigating internal controls at both the family office and individual family member levels to help detect and protect against fraud.

# 05

### Strategic philanthropy and foundation administration

- Monitor charitable giving for compliance with internal and external requirements (e.g., public charity vs. private foundation).
- Oversee philanthropic administration and reporting.

# Enterprise risk management

## TURNING RISK INTO REWARD

In today's dynamic and uncertain environment, Enterprise Risk Management (ERM) is a crucial tool for family offices when navigating the complexities of risk and decision-making. Deloitte can assist with the identification and management of the "vital few" risks that could significantly impact your family office's reputation, strategy, assets, and legacy. By focusing on these specific areas, we foster a culture of risk awareness and intelligence, helping organizations to make confident decisions that align with their strategic goals and business objectives. This proactive approach includes a continuous process of identifying emerging risks and trends, which can assist the organization to stay ahead in rapidly evolving markets.

### RISK MANAGEMENT PROGRESSION



- Next gen risk intelligent**

Uses predictive analytics and data-driven technologies to automate processes, generate insights, and enable risk-intelligent decision-making.  
*"How can I better anticipate risks and opportunities to optimize investments and accelerate performance?"*
- Leading practice**

Risk is built into decision-making. Selectively seize opportunities because of ability to exploit risks.  
*"How can I take smarter risks and capitalize on opportunities to achieve strategies and enhance performance?"*
- Integrated**

Activities are implemented consistently across the enterprise, are correlated and aggregated across risk types and business units and encompass most risk types.  
*"What are the risks across my businesses and strategies?"*
- Defined**

Most business units function independently. Activities are either not applied consistently across business units, or may be in development but are not yet finalized.  
*"What are the risks to each of my businesses?"*
- Developing**

Activities are unstructured, uncoordinated, and undocumented, or they may be absent. No overarching philosophy or objectives are defined.  
*"What are my risks?"*

## OUR SERVICES

### 01 **Enterprise risk assessment**

- Perform a risk inventory to fully understand the risks your family office faces to offer clarity in a complex environment.
- Define risk thresholds and criteria, helping you establish a focused, efficient, and effective approach to risk management.
- Assist in evaluating risks based on their likelihood and potential impact, so management can prioritize its focus accordingly.

### 02 **ERM program design**

- Establish the foundational elements of a strategic, right-sized risk management program tailored to your circumstances.
- Define a clear program vision and governance structure, so you can further align with your objectives and cover the broader enterprise/office.
- Help clarify and delineate roles and responsibilities, creating an effective operating model and process playbook.
- Provide tools to help you enhance transparency and decision-making.

### 03 **Risk mitigation, measurement, and monitoring**

- Uncover the root causes of identified risks and develop focused response plans.
- Assist in development of risk management plans so you can efficiently and effectively facilitate appropriate and proactive risk handling.
- Utilize Key Performance Indicator (KPI)/Key Risk Indicator (KRI) ERM analytics to help you measure and monitor risks effectively.
- Establish monitoring protocols to help you maintain ongoing vigilance and responsiveness.



# Cyber and strategic risk services

## FACE THE FUTURE CONFIDENTLY AND ENHANCE RESILIENCY

At a time when cyberthreats loom larger than ever, leaving your family office vulnerable is not an option. The risk of data breaches, financial loss, and privacy invasions continue to evolve, making cybersecurity a necessity.

Deloitte's Cyber & Strategic Risk practice offers services designed to help meet this challenge head-on, with state-of-the-art cybersecurity offerings, strategic risk assessments, and vigilance against new threats. Our tailored solutions for family offices help protect against current threats as well as anticipate emerging dangers, giving you the peace of mind to focus on your core objectives.

Deloitte helps you build new capabilities, enhance performance, and transform your cyber and strategic risk posture while enabling business growth.



## OUR SERVICES

### **Managed cybersecurity services**

Enhance, transform, and operate your security program with the goal of driving continuous improvement and risk reduction. Services include Threat Intelligence, Security Operations Center (SOC) Monitoring (L1/L2), Cyber Tabletop Exercise, Incident Response Retainer, Attack Surface Management, and Virtual CISO Support.

### **Managed Extended Detection and Response (MXDR)**

Navigate ever-changing cyberthreats with Deloitte's Managed Extended Detection and Response (MXDR) solution for proactive threat identification and response across various systems in near real time.

### **Cloud security**

Leverage an enterprise-grade cloud managed services platform combining advanced, cloud-native security technology with skilled technologists, engineers, and operators to enable end-to-end security management services scaled to your business requirements.

### **Third-Party Risk Management (TPRM) managed services and solutions**

Assist you to more efficiently manage third-party relationships with a broad view of risks and performance across the extended enterprise.

### **Data and privacy**

Understand requirements to meet increased regulatory scrutiny in cyber risk management, data security, and privacy with advanced solutions for privacy control and regulation adaptation.

### **Application security**

Integrate cybersecurity and compliance activities throughout the software development life cycle (SDLC) with solutions to advise, design, build, deploy, and operate secure applications.

### **Operational digital resilience and penetration testing**

Enhance your resilience against cyber incidents with strategies designed to aid in crisis preparedness, business continuity, and recovery, by building capacity for agility, adaptation, and rapid restoration.

### **Identity and access management**

Transform your identity and access management operations with the ability to create real-time automated system access and associated data reports that enable governance, privacy, and audit capabilities.

## CYBER-AT-A-GLANCE

Deloitte Cyber is the world's largest provider of security services. Our technology specialists and experienced business professionals put cyber to work for organizations using the breadth of our knowledge to amplify the impact of cyber solutions and deliver outsized outcomes for our clients.



**30+**  
year history

providing cybersecurity and support, including 10+ years of delivering managed services.



**25K+**  
cyber practitioners

with depth and breadth of technology, business, and industry knowledge and experience.

← → **End-to-end**

multi-disciplinary portfolio with flexible delivery models to Advise, Implement, and Operate business-led outcome-focused solutions.



**2,700+**  
cyber clients

from enterprise to mid-enterprise across major industries, focused on trusted, transformative relationships.



**\$5**  
billion

global hyperscale investment in cyber, cloud, and AI—focused on solutions, talent, acquisitions, and ecosystem.



**Strategic alliances & ecosystem relationships**

across hyperscalers, cyber, technology, data, industry, government, and academia.



**4** **Cybersphere centers**

providing 24x7x365, globally consistent and reliable operational support and solution delivery, augmented by a network of in-region delivery satellite centers.



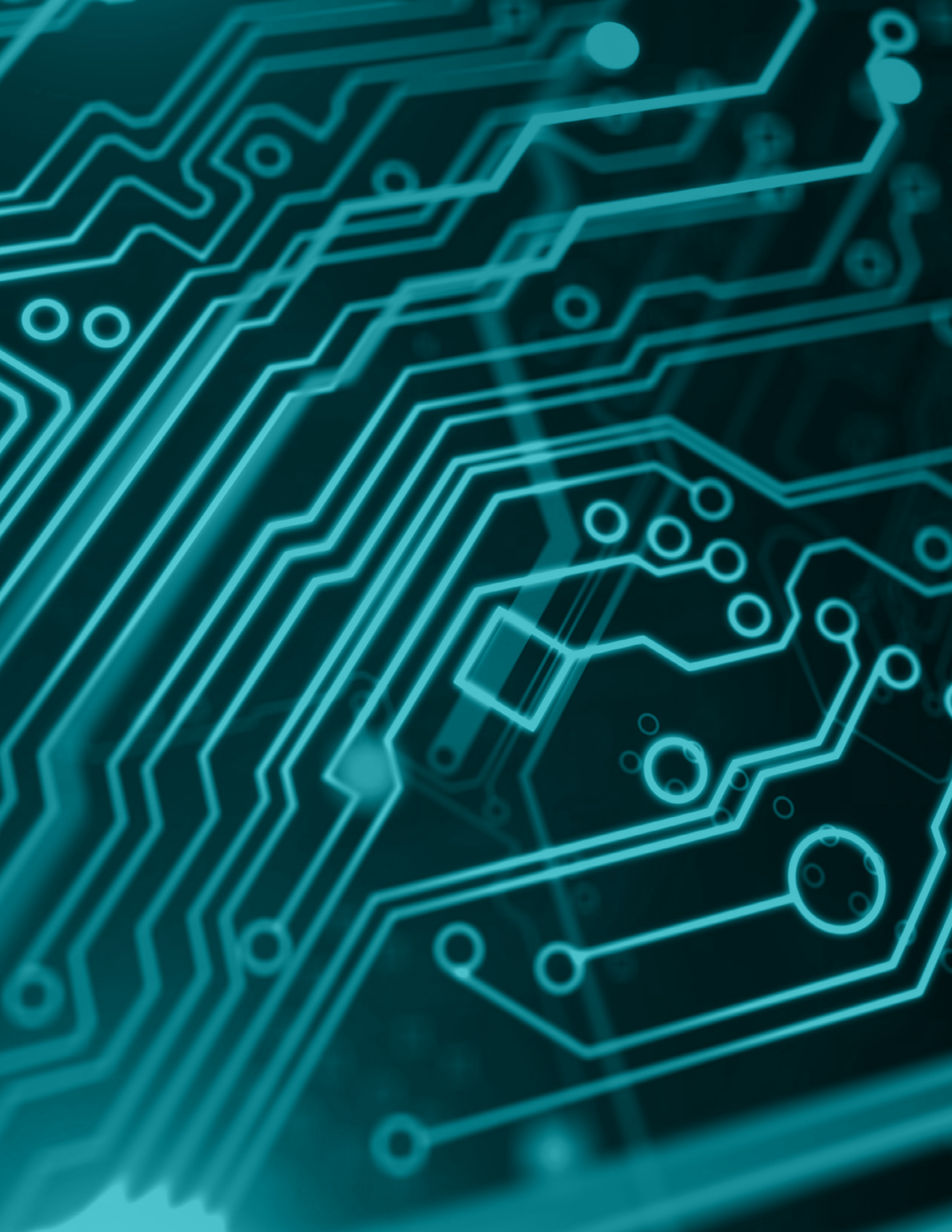
**Access to an expansive global network**

enabling contextualization of services by combining the strength, consistency, and quality of the network of our member firms around the globe with in-depth knowledge and experience in local markets.



**Destination for top talent**

widely recognized for opportunities to thrive, with a culture emphasizing inclusion, collaboration, apprenticeship, continuous learning, and high performance.



# Converged physical security

## YOUR SECURITY, OUR PRIORITY

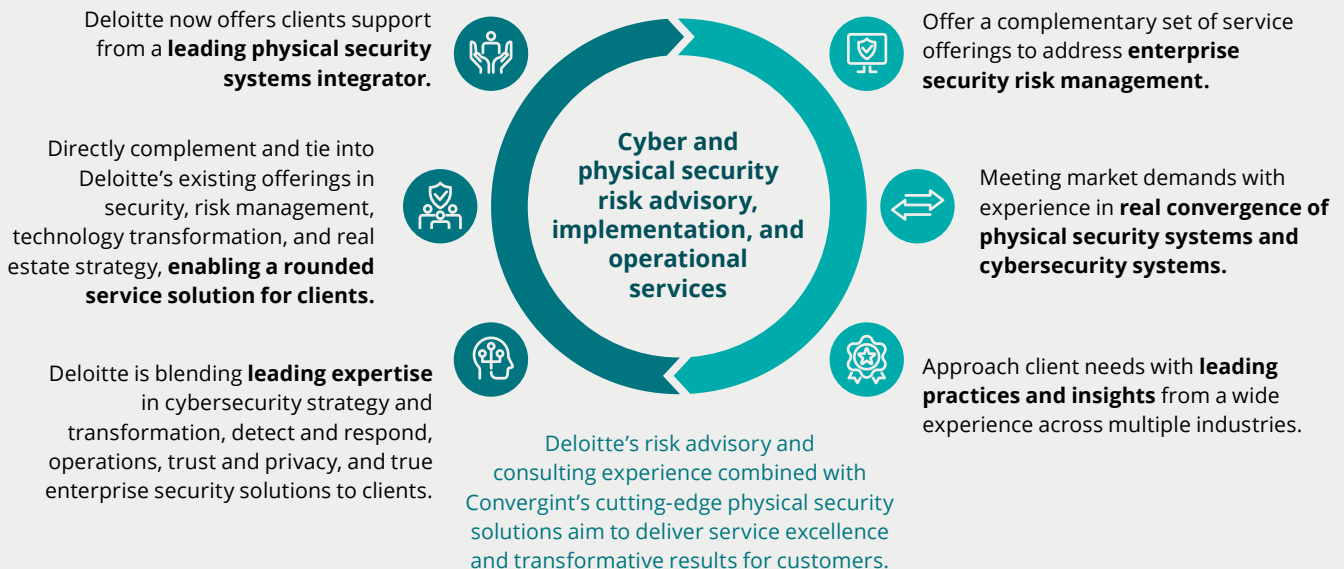
With 54% of leaders anticipating increased instability and global risks, and 30% expecting even more security-related turbulence, the need for a bold security approach is now more critical than ever.\*

Deloitte’s alliance with Convergent Technologies—a global leader in service-based security systems integration—delivers integrated cyber and physical security services to help clients streamline operations, navigate regulatory compliance, address risk, protect assets, maintain resilient operations, and more. Our converged physical security services are tailored to meet the particular needs of each client, providing strategic and operational guidance to enhance security posture and address today’s multifaceted challenges.

Together, we help clients modernize outdated security infrastructure, break down silos, and adapt to new operating models in the era of hybrid work and digital transformation.

### Convergent Technologies alliance

The Deloitte–Convergent alliance brings together the world’s No. 1 physical security systems integrator and No. 1 cybersecurity services firms.



\* World Economic Forum, *The global risks report 2024, 19th ed.*, January 2024.

## OUR SERVICES

01

### Strategic guidance

- Develop and implement strategic security frameworks
- Create strategic plans with defined goals and priorities
- Perform convergence maturity assessments
- Digital transformation roadmapping
- Governance plan development
- Project management
- Risk mitigation strategies
- Identity and access management strategies

02

### Tactical and operational guidance

- Asset identification and prioritization
- Mapping controls to risks and metrics reporting
- Platform implementation and system consolidation
- Training and change management
- Business case development and ROI analysis
- Integration with existing technology and business processes
- Ruleset definition and tuning based on use cases
- Staffing requirements identification and security operations planning
- Continuous improvement planning

By choosing Deloitte and Convergent, you are investing in your security and operational efficiency. Let us help you build a safer and smarter future.

#### Deloitte and Convergent

#### Collaborators in security, leaders in protection

At the convergence of cyber and physical security

Deloitte's alliance with Convergent, a global leader in service-based security systems integration, delivers integrated cyber and physical security services to help clients streamline operations, navigate regulatory compliance, and mitigate risk.

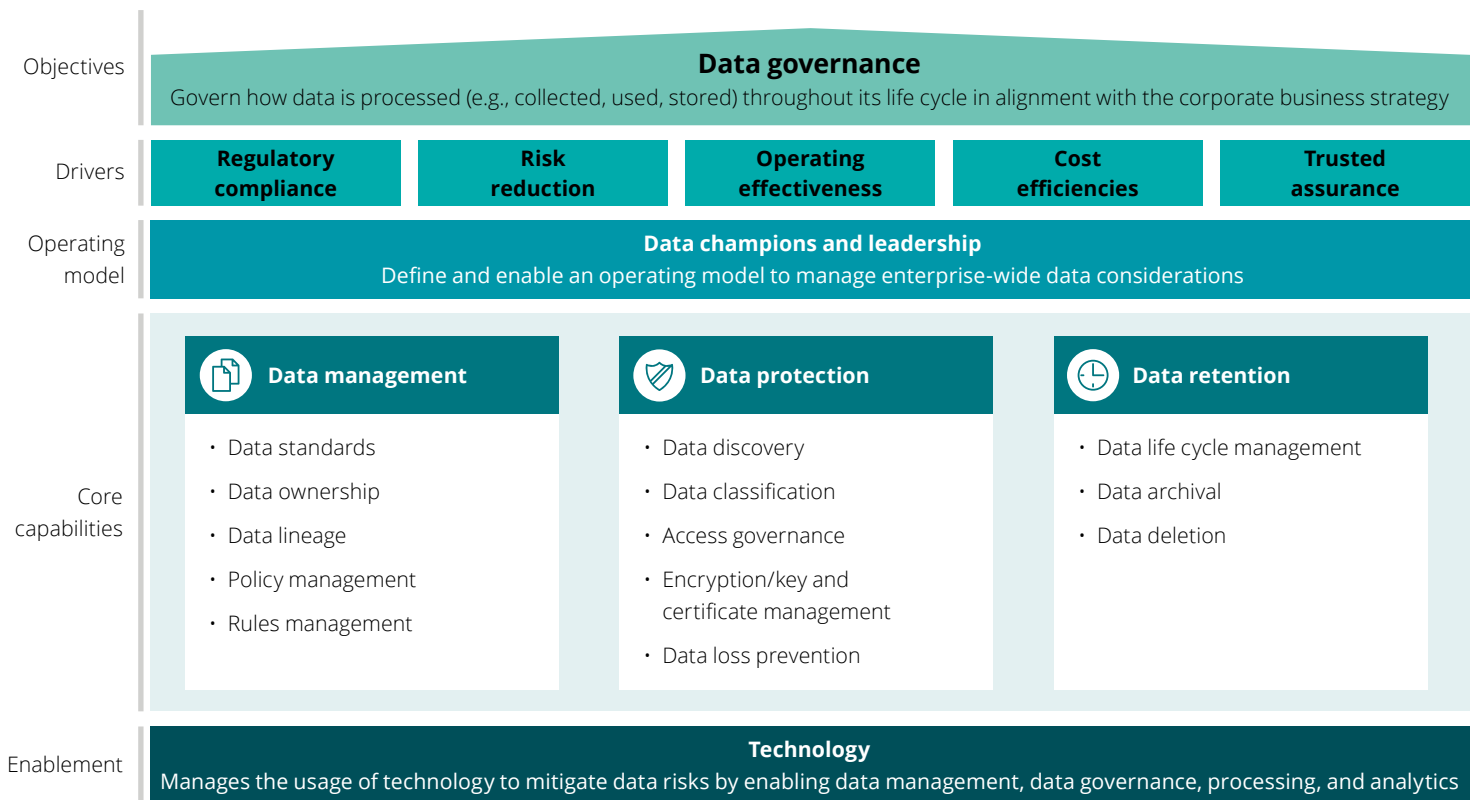


# Data governance and protection

## SAFEGUARDING PRIVACY: ELEVATING DATA PROTECTION IN FAMILY OFFICES

Family offices encounter distinct challenges when it comes to safeguarding sensitive data and upholding the privacy and confidentiality of the families they support. The demand for personal privacy is especially pronounced, given the dynamic and evolving needs of family members. Beyond simply meeting regulatory requirements, family offices must actively protect personal information and secure family data. The consequences of security incidents extend beyond financial and operational impacts—they can also affect the reputation of individual family members. Any breach or security event has implications not just for the office itself, but for the entire family. As such, family offices carry a significant responsibility to establish robust governance frameworks for managing family data and to ensure swift, effective responses in the event of a data breach.

Deloitte’s Data & Digital Trust practice understands the importance of protecting the confidentiality of family members and their assets. Our Data Governance Framework focuses on data management, data protection, and data retention to assist family offices in operating more efficiently and securely.



## OUR SERVICES

Deloitte can help safeguard privacy, manage sensitive information, and swiftly respond to breaches, protecting both operations and family reputations.

ONE

### Data management

As the amount of data organizations contend with daily continues to grow, critical questions arise such as:

- Who in my organization owns the data?
- What is the source of truth of the data, and where should the data be saved?
- What is the latest version of the data?
- What are the expectations for maintaining integrity and confidentiality of the data, and who should have access?

Deloitte can help organizations better manage their data by drafting and implementing data management/acceptable use policies; assessing and implementing tools, such as document management systems to modernize the data infrastructure; and mapping the data life cycle to help organizations gain a better understanding of how data flows through the organization.

TWO

### Data protection and security

Family offices often struggle with knowing what sensitive data they have, where it is stored or sent, who has access to it, and how they are protecting the data from getting into the wrong hands.

Deloitte can help organizations discover and classify their sensitive data, so that controls can be deployed where they are most necessary and effective. We have helped family offices evaluate and implement data loss prevention (DLP), information rights management (IRM), and encryption tools to add additional protections and prevent misuse. Deloitte can assist family offices with change management so that employees are aware of these additional controls and help the information technology department sustainably operationalize data protection tools to enhance its time and efforts.

THREE

### Data retention

The amount of data that organizations create is constantly growing on a day-to-day basis. Given the sensitive nature of the data managed by family offices, data retention can pose a considerable risk and challenge to manage. Employees are often hesitant to delete information in fear of needing it later, thus creating a larger attack surface for an internal or external threat.

Deloitte can help family offices create a data retention policy to meet business and regulatory needs and operationalize policies by helping organizations understand how long data must be retained and when it can be deleted. Subsequently, this can help reduce data sprawl, operational inefficiencies, and storage costs of maintaining large amounts of data.

Regardless of where the family office is on its data governance journey, each small step taken can help the family office mitigate risks to protect the family's data.

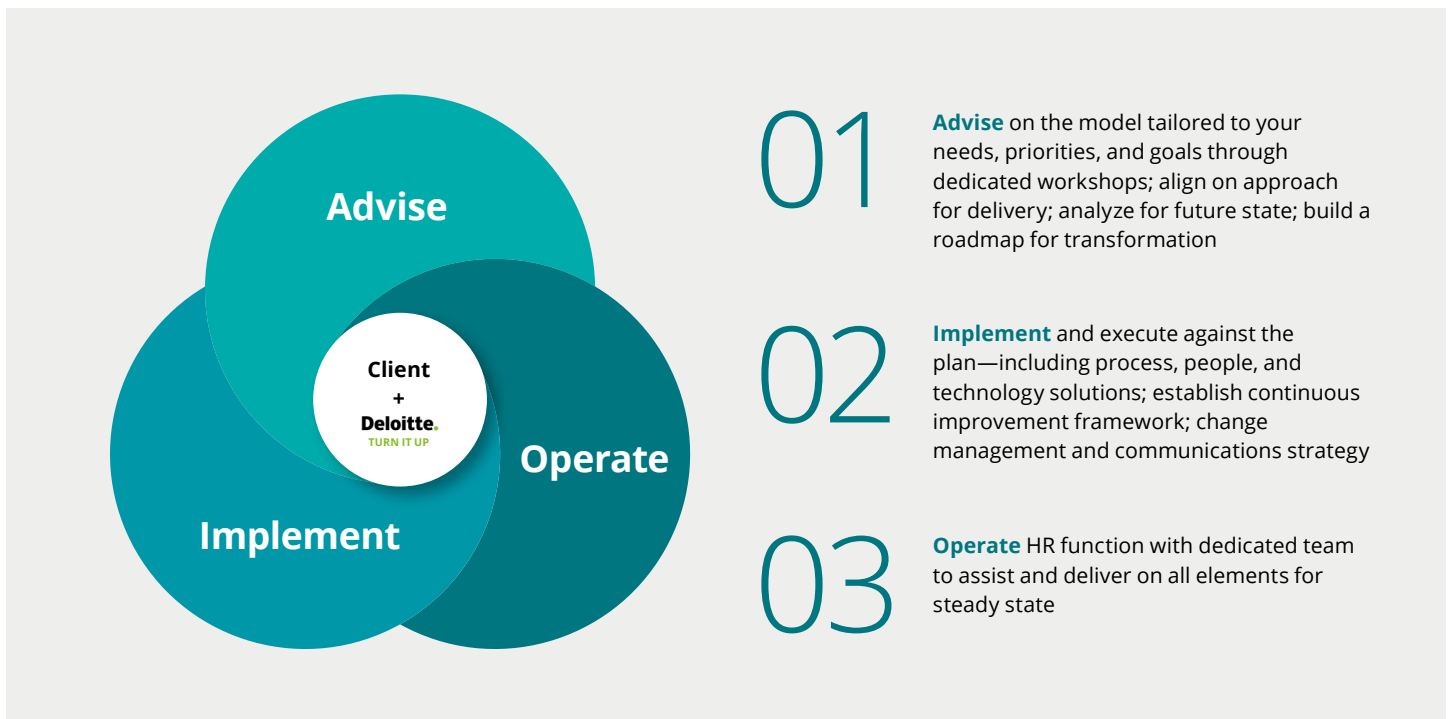
# Human Resources services

## LEAVE THE DAY-TO-DAY MANAGEMENT TO US

We understand the challenges you face. Whether you have a designated head of Human Resources (HR) or need supplemental assistance, we can stand up and run your HR function bringing the broad range of capabilities you need. Through Deloitte’s HR as a Service, tailored to family offices, we deliver core design, advisory, and compliance services.

Working with Deloitte, you will receive:

- Fully outsourced HR function tailored to the unique needs of family offices.
- Specialized assistance across workforce planning and management.
- High-quality services for your employees.
- A scalable and efficient approach.
- Design and implementation to execute payroll and benefits.
- A talent strategy for leading practices.





## OUR CAPABILITIES

01

### **Talent strategy**

Deloitte brings a broad-based approach to workforce planning, talent acquisition, employee development, and retention strategies. By aligning talent management with business objectives, the family office can confirm that it has the appropriate people in the appropriate roles and that they are equipped with the necessary skills and motivation to achieve their goals. We can assist in creating a well-curated talent strategy that enhances organizational agility, innovation, and competitive advantage.

02

### **HR design and implementation**

We can design and implement an HR program through targeted workshops, establishing a broad-based policy framework, and defining roles and responsibilities. We can document end-to-end processes for onboarding, rewards, benefits, performance, and compliance, and create a deployment roadmap. Implementation includes vendor sourcing and management, HR policies, and developing necessary guides, documentation, training, and communication materials. This allows for a robust and efficient HR function aligned with your organization's vision, mission, and values.

03

### **HR operations**

HR as a Service provides broad-based management of daily HR functions, including payroll processing, general HR assistance, addressing client and employee inquiries, and overseeing talent management and performance governance. This service streamlines HR operations, allowing your organization to focus on strategic growth and business priorities.

## 04 **Talent management**

Deloitte helps clients operate an end-to-end talent management architecture to drive organizational effectiveness and employee engagement. Whether you employ an HR leader or want to fully outsource the HR function, we can assist your office with talent acquisition and onboarding, performance management, learning and development, succession planning, and employee engagement.

## 05 **Compensation, rewards, and benefits**

We bring a broad range of services and market-leading advice to design, implement, and operate your compensation, rewards, incentives and benefits programs that include executive compensation, benefits plans, retirement, and 401(k) plans. We can assist with developing competitive, compliant, and market-sensitive compensation alternatives to attract and retain talent. Whether it's establishing a compensation philosophy or completing a competitive analysis, Deloitte has specialists to assist your family office.

## 06 **Compliance**

We can provide a wide range of HR compliance assistance for family offices, from HR policies to federal and state regulations and registration for taxes, I-9 verification, and compliance education. With Deloitte, you have access to a wide range of specialists that not only assist with compliance but also bring market-leading perspectives that evolve and modernize your program.

Whether you are establishing a new family office or have been in existence for decades and are rethinking your organizational design, our team of HR professionals can help advise on, implement, and operate your HR strategy.

# Fraud assessments and awareness training

## SPECIALIZED FRAUD DETECTION, PREVENTION, AND COMPLIANCE FOR FAMILY OFFICES

Family office organizations, due to their inherent reliance on trust and the often-limited regulatory oversight they operate under, are particularly vulnerable to both internal and external fraudsters. Recognizing this susceptibility, our Forensics and Investigations practice offers a comprehensive suite of services tailored to the unique needs of family offices. We provide proactive services designed to identify and mitigate potential fraud risks before they materialize and advise on potential safeguards to put in place. Additionally, we offer reactive services that assist in the thorough investigation and remediation of fraud events when they do occur, helping to restore integrity and confidence within the organization. Through our dual approach, we aim to protect family offices from the multifaceted threats of fraud, to facilitate their continued stability and trustworthiness.

### WHY ARE FAMILY OFFICES VULNERABLE TO FRAUD?



**High concentration of wealth and assets**



**Use of third-party vendors and advisors**



**Limited internal controls, especially IT controls compared to large institutions**



**Jealousy**



**Trusted relationships can lead to complacency**



**Fraud risk assessments are often overlooked**



**Lack of segregation of duties**



## PROACTIVE SERVICES

# 01

### Antifraud programs and controls

Our professionals have the skills and resources to help our family office clients succeed in today's challenging and ever-evolving environment. We offer a combination of technical skills, fraud controls, and investigative tools—plus many years of experience working with family offices—to help deter, detect, and prevent fraud. Specifically, we can work with you to assess fraud risk, benchmark your antifraud programs and controls in relation to the Committee of Sponsoring Organizations of the Treadway Commission (COSO) framework, train family office employees, and perform fraud monitoring and detection.

# 02

### Fraud awareness training

Using our vast experience conducting global forensic investigations and forensic analytics, our team is well equipped to produce and conduct fraud awareness trainings that are specifically tailored to the risks most prevalent to family offices. We educate employees to spot and address the risks associated with fraud schemes that most often impact family office operations, including but not limited to phishing and cyberattacks, vendor fraud, identity theft, and AI-related fraud schemes. Additionally, we educate family office employees on the impact of fraud, including but not limited to reputational impacts and litigation.

# 03

### Compliance program assessments

Family offices can operate within a complex regulatory landscape. Our Advisory practice is well equipped to assist family offices to assess the effectiveness of their overall compliance program, with specific focus on compliance with securities regulations. For those family offices that are registered investment advisers (RIAs), this may include the Investment Advisers Act and the Dodd-Frank Act, anti-money laundering and know-your-customer regulations, as well as employment and labor regulations.

## REACTIVE SERVICES

ONE

### **Investigation services**

Our investigators provide proactive and reactive consulting, analytics, investigation services, and remediation assistance to family office clients, working to manage the risks and vulnerabilities that arise from corruption, fraud, whistleblower allegations, regulatory investigations, and other threats. Our practitioners have extensive experience with all aspects of forensic investigations, including transaction testing and witness interviews, and understand the evolving nature of fraud schemes, specifically those perpetrated utilizing artificial intelligence.

TWO

### **Litigation and dispute consulting**

We can assist family offices and external counsel with a host of potential matters that require litigation or arbitration, expert witness skills, damages calculations, and trial support. Types of cases include contract disputes, purchase price disputes, shareholder suits, intellectual property disputes, vendor contract and cross-border disputes, and other critical and complex issues facing family offices and companies owned by the family.

THREE

### **Corporate Intelligence Services (CIS)**

The Corporate Intelligence Services practice consists of highly trained investigators and intelligence specialists with extensive experience in due diligence, litigation support, fraud, and other investigations. We can gather background information and business intelligence virtually anywhere in the world in a timely and cost-effective manner, including those jurisdictions where public records are sparse. Our work is conducted using a demonstrated methodology, under confidentiality and within the laws of the countries in which we conduct our work.



# Technology implementation and maintenance

## CUTTING-EDGE SOLUTIONS TO COVER FAMILY OFFICES NEEDS

Family offices increasingly recognize the need to establish a trusted technology infrastructure. Whether an organization is new or already established, a solid foundation of essential services, such as email, collaboration tools, and secure access to sensitive information, is critical.

Our approach is tailored to meet the specific challenges faced by family offices, such as the requirement for seamless collaboration, strong security, effective cost management, and compliance with industry standards. By leveraging our deep experience, family offices can focus on their core activities while we handle the complexities of their technology infrastructure.

For family offices, our innovative approach to service desk operations redefines traditional models, enhancing the end-user experience while significantly reducing operational costs.

### Focal points of our solution

#### User experience

Leverage potential of digital technologies and enable capabilities for auto/self service

#### Automation

Eliminate tickets by leveraging power of automation

#### Innovation

Drive new ideas and solutions using Next Gen technology to deliver transformative change within your business

#### Integrated operations

Eliminate the need of a Service Desk after maturity in automation and innovation by integrating with L1.5/L2 operations

## OUR SERVICES

Our Modern Workplace solutions can address these challenges effectively, providing family offices with the tools and services they need to establish a scalable, secure, and efficient technology infrastructure without the need for a full-stack IT team.

### Cloud-based solutions

Leveraging cloud services for email, collaboration, and secure access can provide the scalability and flexibility needed without the overhead of managing physical infrastructure.

### Managed services

Utilizing managed services can offload the burden of day-to-day IT operations, allowing family offices to focus on their core activities, while ensuring their technology infrastructure is expertly managed. Outlined on the next page is a list of services that we can deliver to help family offices streamline their organization.

### Integrated security

Implementing integrated security solutions that cover all aspects of the technology stack, from endpoint protection to network security, to safeguard sensitive data.

### User-centric design

Adopting user-friendly tools and platforms that enhance productivity and collaboration while being easy to use and manage.

### Cost-effective solutions

Choosing technology solutions that offer a good balance of cost and functionality, ensuring that family offices get the best return on their investment.

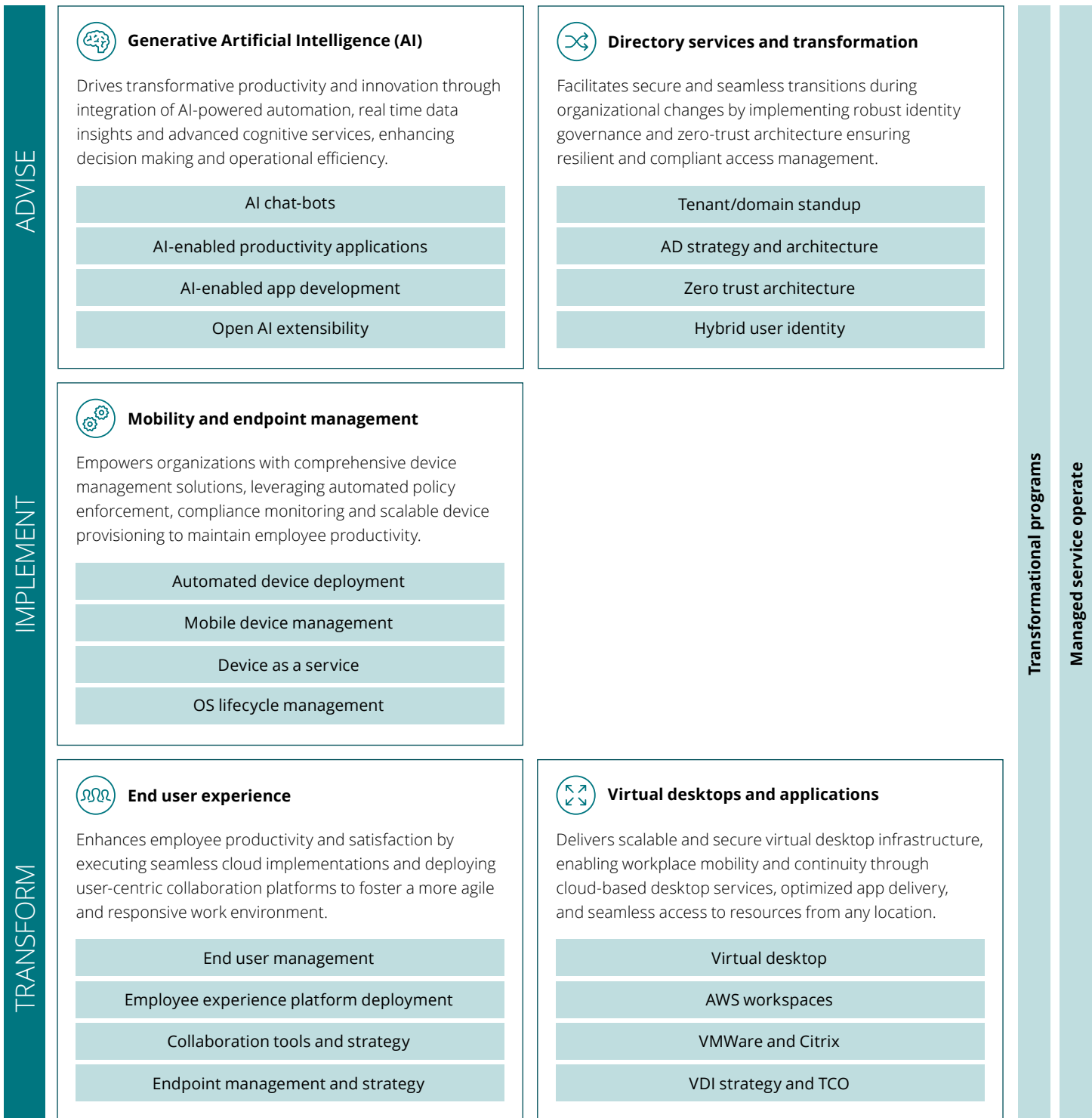
### Compliance and governance

Leveraging technology solutions for regulatory compliance and implementing governance frameworks to ensure data protection, audit trails, and adherence to best practices.



## MODERN WORKPLACE: TECHNOLOGY INFRASTRUCTURE FOR FAMILY OFFICES

Family offices can leverage our Modern Workplace comprehensive advisory, implementation, and transformation services for workplace transformation planning, architecture, and execution. This sub-offering supports the transition of end-user services infrastructure between hosting environments, spanning the entire Modern Workplace life cycle from strategy to transformation and operations.





# Contact us

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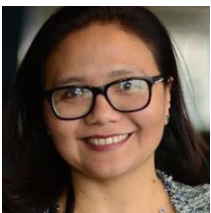


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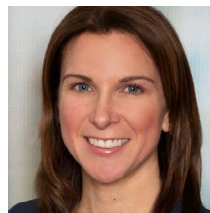


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## OPERATIONS AND TECHNOLOGY TRANSFORMATION



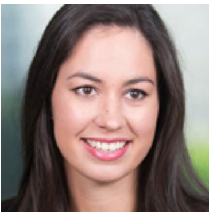
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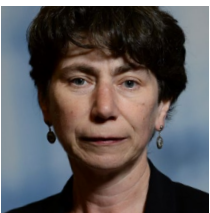
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## CROSS-BORDER FAMILY OFFICE SERVICES



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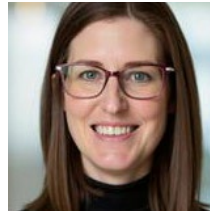
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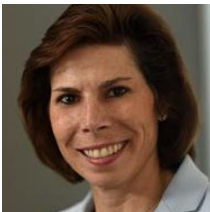
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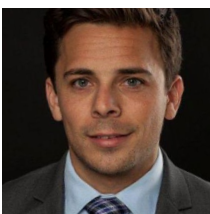
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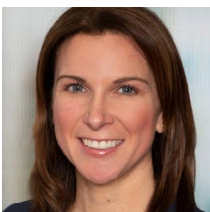
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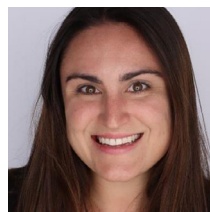
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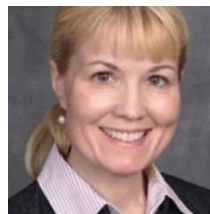
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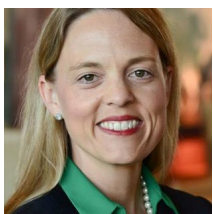


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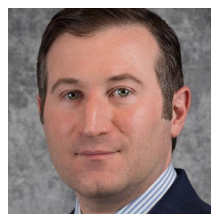


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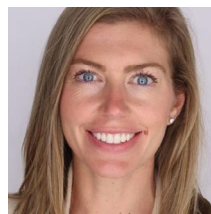


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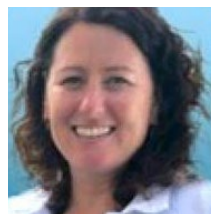


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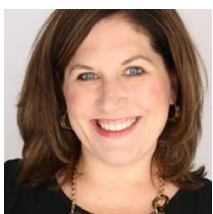


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