

CRM solution for Family Office

A WORD FROM THE FOUNDER

As ever, the latest digital CRM platforms are imperative for managing the wealth of single and multi-family offices, whilst reducing business costs.

At AskLogix, our digital transformation process will upgrade your CRM system and seamlessly facilitate: managing wealth, fundraising processes, maintaining and developing client relationships. This overview outlines what we can provide to give you a digital edge over your competitors.

Get in touch today, I would be happy to assist you in your digital projects.



WHAT WE DO

Asklogix - Family Office is a collaboration and productivity cloud - based solution designed specifically for single and multi-family offices.

Bringing together the **Client Relationship Management, Sales & Marketing and Operational functions across a business**, our solution automates workflows, facilitates collaboration and optimises your operations for growth.

If you are looking to reduce the costs of providing top quality services to the families who depend on you for managing different aspects of their wealth, our solution is for you.

KEY BENEFITS

- **Manage** the active fundraising process and funnel of prospective Limited Partners
- **Build** a relationship with your current and prospective Limited Partners.
- **Increase** effectiveness of communication for your existing clients and prospects
- **Facilitate** Team collaboration - the right information to the right user at the right time - securely!
- **Automate** workflow processes for enhanced productivity and reduction of operation risks

SUPPORTED PROCESSES

- Family Member Relationship Management
- Family level-account reporting
- Provide updates to your clients & close deals faster
- Organise one-to-one meetings, client visits & call reports
- Marketing automation
- Due Diligence
- Events & meetings
- Contacts and document management
- Synchronise e-mails, contacts and calendars with Outlook, Gmail
- Risk and Compliance (CRM)

“Leveraging Asklogix - Family Office, has helped us drastically improve the quality of the service our investors receive, as well as simplified our daily lives”

- Clients Testimonial

KEY FEATURES PROVIDED



Solution based on AI & Blockchain technologies

Our embedded **Blockchain extends CRM** - delivering a fast and easy way to build trusted partner networks that share verified, distributed data.

Our solution powered by AI can help users with smart recommendations about a customer or a prospect based on all the data about that person the system has collected.



Automated client Communications & Collaboration

The incorporation of a **branded portal** enables the client to differentiate their reporting, while extending your brand from simple relationship building to high-touch client engagement.

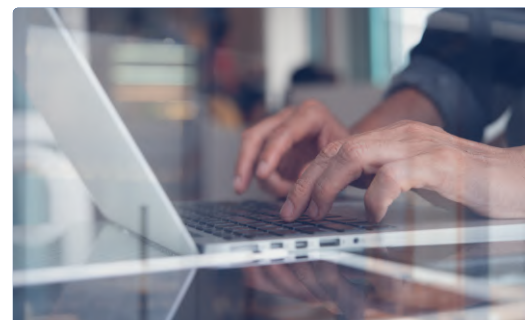
Prospects, investors and their consultants can now all go to a single portal/dashboard and with one login review, manage and produce reports across all entitled funds and accounts.



Compliance and Risk Management

The increasingly rigorous regulatory climate requires new levels of transparency and compliance.

Our solution incorporates a sophisticated Risk and Compliance Management environment, which not only captures all elements of risk via consolidation of disparate data sources, but also **actively predicts** the likely future outcomes.



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