

# The Intelligent Family Office of Tomorrow

3.00pm

Presentation

Welcome to the Family Office Platform of the Future

Robert Mallernee  
Co-founder and CEO  
Eton Solutions

Robert will make a 30-minute presentation on Eton Solutions and explain why the firm was created, why it has been so successful at rolling out its vision of a technologically empowered family office platform to so many high-end clients, and why spreading the word in Asia is so important to the firm.

His message will be simple – too many MFOs are working with outmoded processes and technologies that are not fit for purpose. But that, armed with the right approach and technological solutions, they can fast-forward their operating models to the new world ahead, and at the same time dramatically elevate their overall capabilities, reach, and position themselves to be able to take on more clients, greater scale, without ratcheting up their costs and overhead.

One integrated platform, one database, one source of truth

Robert will explain that one of the major challenges of working in a family office is balancing time spent on routine tasks and reporting with time spent adding value for clients. He will tell delegates why less time spent on data entry and reconciliation directly translates to more time that can be spent achieving long-term business goals.

He knows from long experience that clear and accurate reporting remains a core function of the family office, but he also knows that with more efficient workflows on an integrated platform, the family offices can truly fast-forward their capacity, efficiency and capabilities, through standardising processes, automating core functions, curating best practices, de-risking operations, and revolutionising reporting.

Don't wait for the future to come

He will report that Eton Solutions has created what they believe is the first fully integrated wealth management platform that transforms an MFO's data governance & aggregation practices while automating workflows & processes. He will elaborate on how the firm has built an optimal solution whereby the investment ledger, performance reporting, the general ledger and the tax ledger are all truly integrated and utilise the same transaction-level data.

"Why wait?" Robert will ask. And he will answer emphatically that you should not, because the world of family offices is far behind the curve, because they need to adopt the smart business processes and technological approaches and solutions that have been so successfully applied across so many business sectors today.

Asia – a phenomenal opportunity

And he will explain why Eton Solutions is so interesting in visiting Asia to learn more about Family Offices in the region in order to see how to effectively bring Eton Solutions' learnings and technology to the fore helping newly formed or well entrenched Family Offices to work in partnership to help them take advantage of the Atlas5 technology and Eton's approach to outsourced services which could help accelerate organisations in Asia past their US and Europe counterparts, which have till now been slow to adapt

3.30pm

## Panel Discussion

### How can Asian Family Offices Future Proof their Models?

A small panel of experts comprising leaders of prominent MFOs in Asia will discuss their visions of the family office of the future and debate what they think needs to happen in order to attain those visions.

The panel will address some of these questions:

- Why do the key players consider the outlook so rosy for the multi-family office business sector in Asia, and what do they think they need to further boost their success?
- Are Asia's family offices leveraging the right technologies and approaches?
- How can they use technologies to boost their automation of processes throughout their operations?
- What role should AI- and ML-enhanced data management play in boosting the capabilities and capacity of in-house investment, structuring and advisory experts?
- Can the right technologies and start-of-the-art operational processes produce the right infrastructure for family offices to expand rapidly at scale without majorly ratcheting up their cost bases?
- What does the family office of the future look like, what technology platforms and enhancements will be needed and what are these family offices doing to upgrade their propositions?

#### Speaker

Urs Brutsch  
Managing Partner & Founder  
HP Wealth Management

Kevin Hayes  
President  
Eton Solutions

Kendrick Lee  
Managing Partner and Co-Founder  
Raffles Family Office

Philipp Piaz  
Partner  
Finaport

4.00pm

Webinar Ends