

Simplify Your Family Office Operations

200+
of the world's
leading families
are powered
by Trusted
Family

Why this matters

Single family offices face growing operational complexity, from securely managing and sharing critical financial documents to ensuring efficient communication with family members and shareholders. Managing multiple tools pulls you away from your priorities. A Trusted Family platform solves that.

The Client Experience

From onboarding to strategic consulting, our Client Success Team supports your family office at every stage. We offer personalized setup, regular benchmarking, best-practice guidance, and access to an exclusive peer community.

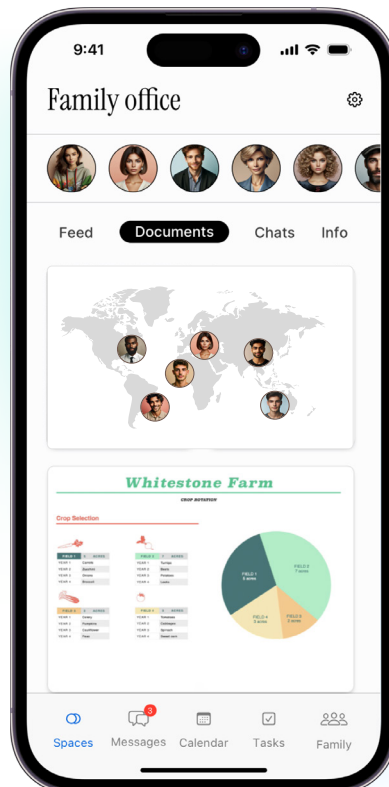
The power of Trusted Family

Secure Storage and Distribution of Files

Safely manage and share sensitive financial reports, legal documents, and other key information in encrypted vaults with the option to distribute them to the right stakeholders with just a few clicks.

Drive Accountability Within the Family Office

Assign tasks to individuals or multiple family officers at once and see what is completed, still needed, or past due.



Efficient Communication

Share announcements, newsletters, updates, and documents with the right stakeholders, ensuring the family stays informed and aligned on key business developments.



Manage Calendars for Meetings and Shared Properties

Coordinate schedules, easily find optimal meeting times and manage use of shared properties.



Library for Family History & Education

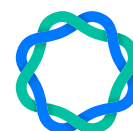
Secure file storage for videos and documents whether for family records or NextGen education.



We've been with Trusted Family since 2010, and it's been a valuable tool for securely managing our important tax documents and information received from our tax providers. The vaults have saved us time and energy, making it easy to organize and distribute documents.



Darla Van Kooten, Vermeer Family Office



Trusted Family
trustedfamily.com