

INFOGRATE

ABOUT US.

We provide operations and technology services to organizations that advise, manage, and support ultra-high net worth clients, whether it be a Single Family Office, Multi Family Office, Private Trust, or Bank's Family.

WE ARE DEEP SPECIALISTS IN FAMILY OFFICE TECHNOLOGY. WE COVER YOU TOP TO BOTTOM, INSIDE AND OUT.



INFO@INFOGRATE.COM



1 (800) 406-5488



LINKEDIN.COM/
COMPANY/INFOGRATE

TECHNOLOGY

STRATEGY

ARCHITECTURE

MANAGEMENT

WHY INFOGRATE?

WE TAKE CARE OF THE MISSING PIECES.



We act and integrate like members of **your** team, not project or business management consultants.



Each and every one of us, right down to the office manager, hails from the ultra-high-net-worth marketplace.



We're technology and operations-centric for a narrow niche market.



We're service oriented and thoughtful.



We're flexible, fast, results-focused, and cost-conscious.



We're a tight family team and have been together for over two decades.

HOW WE CAN HELP

We start each project at the top level with a focus on value and efficiency. We evaluate, check, re-work, oversee, and evolve clients' architecture accordingly.

We track over 400 products in the marketplace and select and buy solutions as appropriate. We support implementations, communicate, and integrate or fill in gaps in offerings. We can also develop custom solutions, data warehouse, and/or develop wrap around tools as needed.

Our team of senior technology architects and operations managers are dedicated to efficient implementations and to building low-cost, scalable processes that can be effectively maintained.

**SO YOU CAN FOCUS ON
YOUR FAMILY OFFICE.**

WHAT WE OVERSEE



APPLICATIONS

We work with you to implement, monitor, and maintain new and existing applications integral to business function and growth.



OPERATIONS

Accounting from the General Ledger and Accounts Payable to Partnership Accounting to Portfolio Accounting. We connect these to ensure a seamless process.



REFERENCE DATA

We work with you to manage existing databases and provide advice and implementation services for new database services.



INFRASTRUCTURE

We design and oversee your physical and cloud architecture, from security and risk to integration and data flow.



INFO@INFOGRATE.COM



1 (800) 406-5488



[LINKEDIN.COM/
COMPANY/INFOGRATE](https://www.linkedin.com/company/infograde)



CONTACT US

INFO@INFOGRATE.COM

 **INFOGRATE**