



# MyFO.

The Most Advanced Family Office Experience



## Unlock Time and Wealth with MyFO

MyFO's state-of-the-art wealth management platform empowers you to seize control of your financial destiny, simplifying complex tasks into one secure hub.

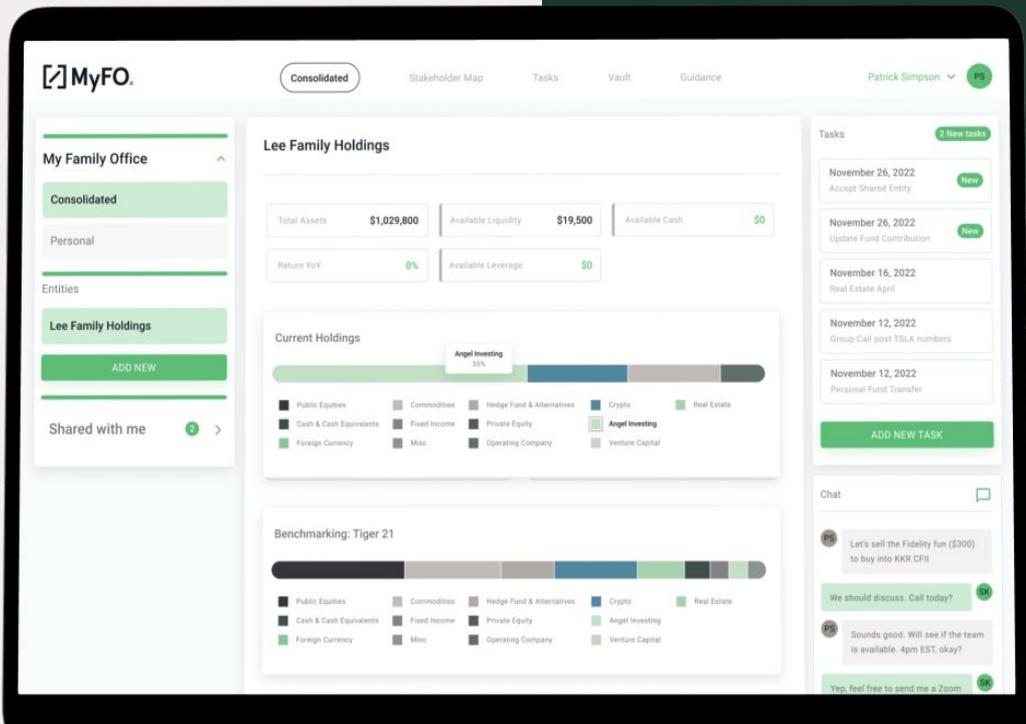
Unlock more time for what matters: enjoying life's precious moments instead of being an admin to your life. With MyFO, you're not just managing assets; you're cultivating a life of confidence, clarity and connection



## Status Quo

- Time-Consuming Coordination & Collaboration
- Fragmented Financial Views
- Cumbersome Technology
- Stressful and Complex User Interactions
- Disconnect with the Aspiring Generations
- Lack of Comprehensive Insight & Control





# MyFO.

- Automated Convenience
- Unparalleled Scalability
- Streamlined Coordination
- Effortless and Efficient
- Rapid and Responsive
- Trustworthy and Secure

# Why MyFO?

## MyFO.

- Flexible Architecture
- Scalable
- Modern Tech Stack
- Propriety & 3rd Party Data Integration
- Evolving Features
- Custom Dashboard Designs
- Modern UX/UI
- Self Onboarding

## The Competition

- Siloed data
- Expensive
- Hard to integrate
- Outdated Architecture
- Outdated UX/UI
- Long onboarding - 3-6 Months
- Manual
- Inflexible



**256-Bit Encryption**

**Multi-factor Authentication**

**SOC 2 Compliant**

**Identity Verification**

**Data Disaster Recovery**

## **Best in Class Security**

With MyFO, users own their data, documents, and information and can add, delete, or download digital property at will.



## UPCOMING FEATURE: MyFO Vault

- **Secure Storage:** Safely store, manage, and share financial and legal documents with MyFO's Vault.
- **Intelligent Organization:** Benefit from MyFO's recommendation engine that suggests custom folders tailored to your estate and investment needs.
- **Effortless Sharing:** Easily share vital documents with stakeholders without compromising security.
- **Time-Saving Management:** Enjoy organized, efficient access to all your essential documents, saving time and enhancing control.

## UPCOMING FEATURE: Scenario Modeling

- **Simulate Transactions:** Mimic buying and selling assets to explore various investment scenarios and the impacts on your net worth.
- **Compare and Decide:** Analyze different scenarios side-by-side to make the most informed investment decision.
- **Informed Investment Decisions:** Leverage MyFO's Scenario Modeling for strategic investment choices.
- **Intuitive Interface:** Navigate effortlessly with a comprehensive and user-friendly design.

