

Family Office Software & Technology Report 2025

2025 marks a strategic inflection point for family office technology. After years of experimentation and piecemeal adoption, the uptake of digitalisation has multiplied. But family offices are not just digitising — they are building systems that integrate their data into efficient, transparent workflows. The winners in this new era will be defined not by scale, but by clarity, connection, and confidence in their data.

This edition draws on data from nearly forty vendor submissions, 11 000+ platform users, and live family office interactions throughout the year.

What's Changed Since 2024

AI has become infrastructure.

Over 90 % of vendors now report using AI within live workflows. Adoption has moved from pilots to production, with natural-language and voice-based onboarding reducing manual input and improving document accuracy.

Integration remains the defining constraint.

Three-quarters of vendors cite reconciliation and private-market data ingestion as their biggest challenge. As stacks mature, buyers are favouring end-to-end platforms or pre-tested connectors that reduce middleware fatigue.

Excel's dominance is finally eroding.

While spreadsheets persist in parallel workflows, fewer than one-quarter of new prospects rely on them as their primary tool — a clear marker of digital maturity.



Procurement has become more structured.

Next-Gen and Operations leaders now drive platform evaluations, focusing on interoperability, onboarding speed, and support reliability rather than feature breadth.

Key Market Signals

Trust is the new KPI.

Across all 2025 research inputs, “trust” appears more frequently than “AI” or “integration.” The strongest buying signal is no longer functionality but credible proof of data reliability.

Digital maturity is accelerating in emerging hubs.

Offices launching in the UAE, Singapore, and parts of Africa are starting cloud-native, often integrating compliance and automation from day one — capabilities that many established markets are still retrofitting.

Vendor focus is shifting toward onboarding and modularity.

Providers are redirecting resources from new features to faster implementation, clearer governance, and flexible modules that integrate easily into existing stacks.

What Family Offices Want Now

- Native-feeling integrations with custodians, fund administrators, and accounting systems.
- Clear governance frameworks for AI — explainability, privacy, and auditability.
- End-to-end implementation support from onboarding through steady-state use.
- Systems reflecting real-world complexity — configurable, cross-border, and secure.
- Structured data ownership and reconciliation, ensuring provenance and control.

2026 Outlook

- Platforms → Ecosystems → Infrastructure
- Further segmentation before consolidation
- AI maturity will stratify the market
- Interoperability and explainability will define success

What This Means

Family offices are no longer passengers in the technology journey — they are architects of their own operational advantage. The next wave of progress depends not on more tools, but on building interoperable systems that families can trust, scale, and evolve.