

## Flanks for Family Offices



### Challenge

Family Offices manage multi-entity wealth with inherited processes, often relying on outdated manual workflows to track assets across custodians and get a unified view of clients' full wealth. This creates blind spots, rising costs and delays, especially with alternative assets and layered family structures.

### How we help

Aggregate

Lume

Flanks automates the full wealth data flow across all asset types and institutions. We consolidate liquid and illiquid assets across custodians, adapt to each family's structure and data granularity needs, and deliver ready-to-use insights that empower advisors to offer more personalised service at scale.

### Benefits

- ✓ Automate wealth data gathering, cleaning and transformation
- ✓ Gain updated wealth data from banks, brokers and private markets
- ✓ See full wealth, including illiquid assets such as real estate and PE
- ✓ Access reconciled, high-quality data with no manual input
- ✓ Fix inconsistencies with expert-verified insights