

Strad Pro

The **Modern** Virtual Family Office Platform

A Unified Solution for Advisors Serving Complex Families & Business Owners

Advisory firms today face an industry wide evolution that begins with expectations of the clients they seek to serve.

Investors no longer judge value solely by portfolio performance. They expect clarity, coordination, cybersecurity, multigenerational visibility, and seamless collaboration across every aspect of their financial lives.

At the same time, advisory teams are overwhelmed by fragmented systems, planning tools in one place, CRM in another, document storage elsewhere, and no centralized client experience.

Strad solves this problem.

Strad is a secure, client-facing Virtual Family Office platform that organizes everything that touches a client's financial life into one cohesive environment. All without replacing the tools advisors already use. And for a client that owns a family business, or for Advisors who cater to business owners, Strad has a Business Office embedded within the platform, all for the same price.

This Enables Your Firm To:

Elevate service
beyond performance
reporting

Differentiate in
competitive markets

Deepen relationships
with complex families

Unlock growth within business owner
households

Deliver family-office level service to
the mass affluent

The Industry Challenge

Modern advisory firms face **five** pressures:

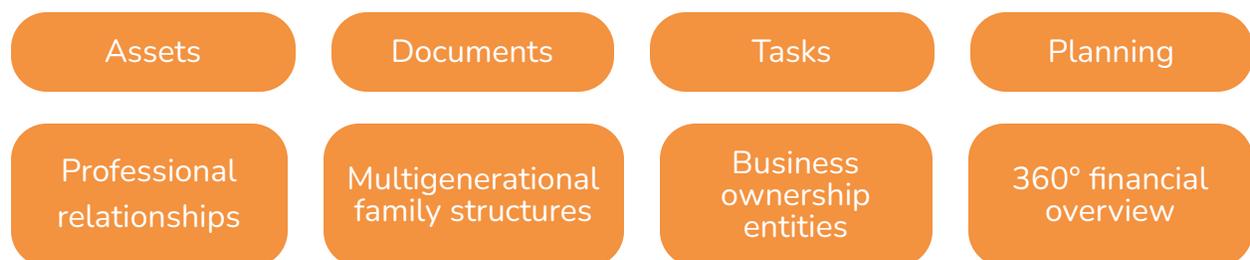
- 1 Rising client service expectations
- 2 Increasing family complexity
- 3 Cybersecurity risk
- 4 Generational wealth transfer
- 5 Margin compression & fee scrutiny

Traditional tech stacks were built for account aggregation and planning, not for managing households, entities, business ownership, and multigenerational collaboration.

Clients want a command center. Advisors need a scalable way to provide it. Strad is the solution.

What Is Strad?

Strad is a secure Virtual Family Office platform designed to centralize:



It is client-facing, advisor-controlled, and permission-based. Strad enhances your existing tech stack, it does not replace it.

Core Platform Capabilities

Unified Financial Dashboard

Strad aggregates and organizes:

- Investment accounts
- Real estate
- Private equity
- Insurance
- Banking relationships
- Liabilities
- Business ownership stakes

Clients see their entire financial world in one structured environment.

Advisors gain clarity across households and entities.

Document Management & Secure Vault

Strad provides:

- Centralized document storage
- Editable file management
- Secure sharing
- Version control
- Permission-based access

From estate documents to operating agreements to insurance policies, everything lives in one protected location.

Household & Entity Structuring

Strad organizes:

- Family members
- Trusts
- LLCs
- Partnerships
- Corporations
- Foundations

Advisors can visually map ownership structures and generational relationships.

This becomes critical for succession, tax planning, and governance.

Task Management & Collaboration

Strad supports:

- Task tracking
- Workflow coordination
- Advisor-to-client collaboration
- Multi-professional communication
- Permissioned access by role

Accountants, attorneys, insurance professionals, and advisors can coordinate inside one environment.

Professional Relationship Integration

Strad tracks and organizes:

- CPAs
- Estate attorneys
- Insurance agents
- Business partners
- Trustees
- Family office staff

Advisors gain visibility into the client's entire advisory ecosystem. No more blind spots.

The Differentiator: Strad Business Office

Few Virtual Family Office platforms support both:

Household Wealth

Business Operations

Strad Business Office allows advisors to:

- Manage business entity assets
- Organize corporate documents
- Track key executives
- Expand into C-Suite insurance and planning opportunities
- Coordinate business and personal wealth under one umbrella

For advisors serving business owners, this unlocks deeper engagement and expanded revenue.

Enterprise-Level Security

Strad maintains SOC 2 Type 2 compliance, demonstrating:

- Rigorous security controls
- Operational integrity
- Data confidentiality
- Ongoing third-party auditing

Advisors can confidently position Strad as a secure client environment.

Designed for the Mass Affluent & Complex Families

Historically, family offices were reserved for ultra-wealthy households. Strad democratizes that structure.

Forward-thinking advisors can now deliver:

- Centralized coordination
- Structured documentation
- Multigenerational access
- Governance clarity
- Cyber-secure collaboration

Strad enables advisors to bring more to families and business owners who are seeking next level service.

Advisor Benefits

Firms using Strad gain:

- Differentiation beyond performance
- Stronger retention
- Enhanced enterprise appeal
- Higher perceived value
- Deeper business owner penetration
- Expanded cross-selling opportunities

Strad becomes the digital infrastructure behind modern advisory growth.

Who Uses Strad?

- ✓ RIAs serving complex households
- ✓ Enterprise firms with hundreds or thousands of advisors
- ✓ Advisors focused on business owners
- ✓ Multi-generational planning specialists
- ✓ Insurance-integrated advisory teams
- ✓ Firms moving toward a Virtual Family Office mode

The Strategic Outcome

Strad transforms advisory firms from:

Investment Managers



Comprehensive
Family Office Partners

It provides the structure, security, and clarity that modern families demand, while driving measurable growth for advisory firms.

What's Next?

Advisory firms that adapt will lead the next decade. Those that remain fragmented will struggle to justify their fees.

Strad provides the unified platform to:

- Collect
- Collaborate
- Manage
- Protect
- Grow

Request a demo today to talk to our platform experts and see how Strad can elevate your firm's Virtual Family Office offering.



[Book a call](#)



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