SUMMITAS

A Family Engagement Platform to Enhance Communication, Service, and Happiness.

Award-winning Summitas Platform® increases engagement by helping you provide:

- Everything family members need at their fingertips
- Easier communication and collaboration
- Greater peace of mind with online privacy and protection

With Summitas Platform, you eliminate hassles for the people you serve. They have one hub to access everything. You're able to reach them with more than just numbers and graphs. You become freer to innovate and streamline the service you provide.

Our solution

Summitas Platform provides branded portals hosting solution-specific apps.

- **Secure** — Privacy and data integrity are designed into our software.
- **Scrutinized** — Our architecture, algorithms, and infrastructure have been subject to technical due diligence by leading data security firms and Fortune 100 companies.
- **Vendor-Neutral** — Once your custom, branded portal is set up, changes to the underlying software and systems that feed it will not disrupt the client experience.
- **Configurable** — Built to extend and amplify the family's legacy, your customized portal can be reconfigured at any time with available Apps or new Apps developed to achieve your goals. Our Apps address a wide range of functionality:

DOCUMENT MANAGEMENT | *Summitas Digital Vault®, eSignature, and SecureShare™*
Protect data privacy and integrity with encryption, obfuscation, and other safeguards enforced by roles and permissions. Enable best-in-class, real-time reviewing and signing with partner DocuSign®. Provide confidential, controlled sharing with any recipient.

WHERE WEALTH OPERATES™ | WWW.SUMMITAS.COM

INFORMATION DELIVERY | *Financial Dashboards, Articles, Forums, Blogs, and more*

Link to vendor-specific APIs to automate secure delivery of reports and statements. Deliver a holistic summary of family assets. Create forms, push relevant articles, host forums or blogs, and share insights and news.

PRODUCTIVITY | *Tasks, Calendar, Contacts, Ticket Hub, and Forms*

Create projects, manage tasks, create calendar entries, and enable family members to sync with other digital calendars. Offer a shared directory with family relationships, photos, and rich details. Let members search for events, reserve tickets, and request parking passes through an easy-to-use reservation system. Use dynamic forms to collect data, e.g., for onboarding or polling.

COMMUNICATION | *Private Messaging, Activity Wall, and Ask the Advisor*

Create private messages and a social networking wall for members to exchange ideas, videos, photos, and links. Use video communication to host secure meetings. Provide advisor Q&A. Offer secure email using your current provider through a partnership with Proofpoint®.

FAMILY | *Family Trees and Photo/Video Albums*

Map family relationships, including support for multi-marriage, photos, and descriptions. Securely store photos and video.

ADMINISTRATION | *User and Portal Management, Compliance, Auditing, and Metrics*

Provision users, assign roles and permissions, and manage global portal settings. Record activity with timestamping. Preserve advisor-client communication for eDiscovery through partnerships with Smarsh® and Global Relay®. Track portal growth, engagement, and usage.

INVESTING | *Ventures*

Select and fund curated alternative investments, then track results.

Summary

You benefit from a singular branded online presence that extends the family identity and imparts your office's vision and capabilities. Apps streamline processes and everything relevant to the family members served by your office is available, protected, and backed up. As a result, engagement and happiness increase. They return to the site more often because posting, sharing, and collaborating are easy and fun. With your branded portal, families come together to do more than review financials; they have access to their critical legal documents, a timeline wall, family trees, multimedia albums, and more that provide space and reason to communicate often. It builds family cohesion and transparency. That's a good thing.

About us

Summitas is a software company founded in 2007 to bring a new level of engagement between families, family offices, and wealth advisors who need to exchange confidential information securely, store sensitive documents and share ideas—all from one place.