



Private Wealth  
& Family Office  
Association

**WEALTH SERVICES  
AND FAMILY OFFICE  
REPORTING SOFTWARE  
INTRODUCTION**



Private Wealth  
& Family Office  
Association

**Welcome** to “Wealth Services and Family Office Reporting Software”. This program has been developed from the home of Private Banking & Family Office Service - Switzerland and will provide you with the purpose, benefits, properties and specifications of some software that can be used to facilitate recording, monitoring and reporting from a wealth service and family office standpoint.



We have cut through the noise and created a down to earth, value packed, practical and easy to understand program that will get you started towards finding reporting software solutions that will meet your needs.

While this program is **self-contained**, it is also **part of a wider series of programs** that work together to assist individuals to understand the realities of the wealth services world and to navigate through it successfully.





Having trained many professionals and studying the latest educational trends, it has been understood that simply listening to someone talking for hours and/or reading a textbook is quite simply not the best way to provide real impact training.

Hence this program has been re-engineered to ensure you gain real value and that you want to work with us further to support your development in your career or business in private wealth services.



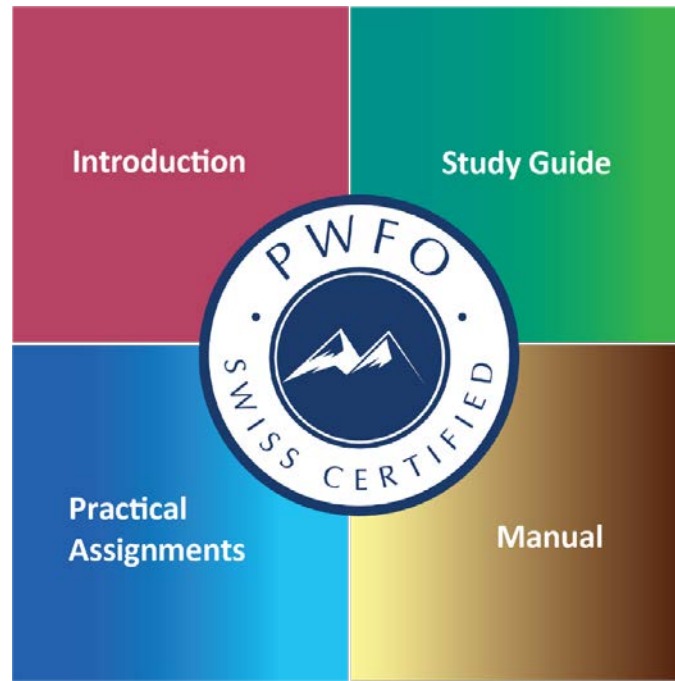
By this and contrary to many other learning programs out there, we mean it will be you who will be doing the work through research and a set of practical assignments.

Of course, you will receive content through the program, but more importantly you will already have begun (or really progressed) in your journey in the world of wealth services.



Private Wealth  
& Family Office  
Association

Each program has several learning outcomes that are tackled through the following framework of:



## **INTRODUCTION**

A short explanation that will investigate the reasons that we are studying these concepts and ideas, and how these may benefit you.

## **STUDY GUIDE**

The Study Guide provides a holistic view to your study and has been designed to accompany you throughout your journey.

## **THE PRACTICAL ASSIGNMENTS**

This is the fun part and the core of the program. It is a series of questions/scenarios that will project you into the field of a professional wealth services and/or family office practitioner.

## **THE MANUAL**

The manual will provide relevant content for that program as curated by the Private Wealth & Family Office Association.



Private Wealth  
& Family Office  
Association

Whilst we do our best to ensure all of the content provided is correct, relevant and up to date, sometimes errors and mistakes still occur. If you notice anything out of place, incorrect or something you disagree with please let us know by sending an email to [info@pwfo.org](mailto:info@pwfo.org). We will get back to every email received.