

# CRM Software for Family Offices



Single and multiple family offices can equip themselves with a comprehensive software platform by SatuitCRM. Tailored specifically to meet their needs, this system is equipped with the capabilities to manage reports and documents securely and efficiently.

## Features Unique to Family Offices CRM



Customizable  
Modules



Secured Investor  
Portal



Centralized  
Document  
Location



Protected Contact  
Information



Advanced  
Security Measures



Exceptional Support Service  
from Client Success Team

## Benefits of Satuit CRM for Family Offices



Manage Permissions  
Across Accounts  
Effortlessly



Documents Are Shared  
Seamlessly Through  
Document Repository



Seamless Third Party  
Integrations



Enhanced Relationship  
Management and  
Service

## Why SatuitCRM for Family Offices Is the Best Choice

Satuit's Family Office Management Software offers comprehensive wealth management solutions, ensuring secure information management, streamlined reporting, and centralized document access. With customizable modules and seamless third-party integration, SatuitCRM delivers unparalleled support and efficiency for both single and multi-family offices.

