

# SAGE INTACCT CLOUD ACCOUNTING FOR FAMILY OFFICES

## Take control of your family office with modern cloud accounting software

Single and multi-family offices need scalable financial management tools that meet ever-evolving wealth portfolio goals and diverse lifestyle requirements—and CFOs are best-placed to lead the charge into better outcomes by owning the digital transformation efforts of their firms. That's because they are increasingly relied upon to guide decision making, streamline financial processes, and to provide strategic insights to the C-suite.

From navigating the consolidation of multiple entities to managing intricate investment structures and rising performance expectations, Sage Intacct empowers CFOs to streamline operations, gain real-time visibility, and deliver strategic value to the families they serve—through a single source of financial truth. With Sage Intacct, family office CFOs can take control and become a source of confidence for their clients.

## Multi-entity management, built for family offices

As you grow assets under management (AUM) and expand your portfolio, manual processes quickly become a bottleneck—slowing productivity and obscuring insights. Managing multiple holding and operating companies, responding to increased demand for more complex and frequent reports, and navigating a web of complex investments and asset classes requires more than spreadsheets and outdated systems.

Sage Intacct is purpose-built for family offices, delivering up to 50% efficiency gains so CFOs can focus on what matters most: strategic decision-making and portfolio growth. With intuitive core accounting functionality, a dimensional general ledger, continuous multi-entity consolidation, customizable dashboards, workflow automation, and a rock-solid audit trail, Sage Intacct gives you the clarity and control to lead with confidence. Say goodbye to obscured data and tedious spreadsheets, and hello to ownable impact.



Atlantic  
Sage

# Real-time visibility and insights for high-performance CFOs

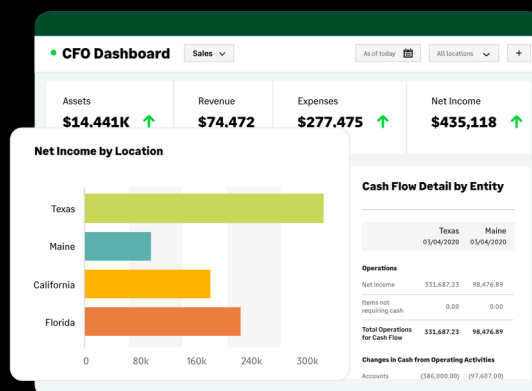
Family offices need real-time, granular visibility into financial and operational metrics to make data-driven decisions. The robust reporting available with Sage Intacct allows you to consolidate and drill down by operating company, location, instrument, currency, and more in minutes—no hours or days.

Every transaction in the system is tagged with dimensions, so finance teams can sort, view, filter, and report on the specific information they need with ease. With these powerful in-system tools, CFOs can steer the family office with confidence, backed by insights that are always up to date.

# True cloud technology with open API

As an innovator in the cloud space, Sage Intacct was built to deliver multi-entity, multi-currency, financial management platform purpose-built for the finance sector. The open API enables integration with 350+ network partners, meaning finance teams can seamlessly connect to existing tech stacks, and build capacity for tomorrow. Key data from expense management, payroll, budgeting, portfolio reporting tools such as Addepar, and others, flows into Sage Intacct so CFOs can track metrics that are central to investment and operational performance.

This dashboard is designed to give family office CFOs a real-time, consolidated view of financial health and investment performance—all in one place. It brings together key metrics across asset classes, entities, and currencies, therefore enabling faster, more confident decision-making.



# Sage Intacct recognized by finance experts

- AICPA: Sage Intacct is the first and only preferred provider of the AICPA.
- G2: Sage Intacct has the highest customer satisfaction score for multiple accounting categories on G2, a leading business software review platform. Clients often tell us that before switching to Sage Intacct, their consolidation processes were heavily manual—relying on spreadsheets and time-consuming workarounds that sat outside of their core systems. With Sage Intacct, they can now generate consolidated balance sheets for any entity and time period directly within the platform.

With intuitive visualizations and dimensional reporting, finance leaders can quickly assess liquidity, monitor trends, and drill into the details that matter—without having to use manual spreadsheets or fragmented systems.

It's not just about seeing the numbers; it's about unlocking insights that drive smarter strategy and long-term wealth preservation.



Purpose-built features to simplify processes, save time, and deliver strategic insight:



Automated AP and AR—Streamline payments and invoice approvals with AI-powered automation.



Multi-entity and multi-currency consolidation—close the books faster across complex structures.



Dimensional general ledger—Tag every transaction for flexible, real-time reporting, and a simplified chart of accounts.



Custom dashboards and reporting—Deliver tailored insights to family members, advisors, and firm personnel.



Budgeting and planning—Align financial strategy with family and investment goals.



Cash and spend management—Monitor liquidity and control discretionary spending.



Fund accounting—Track depreciation and manage pooled investments.



Vendor payments—Simplify submissions, approvals, and disbursements.



Open API integrations—Connect seamlessly with tools like Addepar, Knowledge, and Bill.com.



Workflow automation—Reduce manual effort across approvals, reporting, and reconciliation.



Partner ecosystem—Access expert implementation and white-glove support.



True cloud access—Secure, scalable, and always up to date.



#### High-Performance *in Numbers*:

- Trusted by hundreds of family offices.
- Reduce multi-entity consolidation time by up to 85%, going from days or weeks to just minutes.
- Cut time to close by up to 70%.
- Cut reporting time by up to 90% via automated processes.
- Return on investment of 441%

Take a product tour →

For More Info:

Contact: Atlantic, Tomorrow's Office

[marketingteam@tomorrowsoffice.com](mailto:marketingteam@tomorrowsoffice.com)

+1 (866) 356-2654

[www.tomorrowsoffice.com](http://www.tomorrowsoffice.com)

Sage

High-Performance  
Finance Software

POWERED BY 

Atlantic