PARTNERSHIP ANNOUNCEMENT

Strad Pro x FIG

Introducing Strad:

The Virtual Family & Business Office Platform for Every Household and Business

Strad is a modern Virtual Family & Business Office platform that enables financial advisors to deliver a comprehensive, organized, and secure experience for their clients. By bringing together financial and non-financial assets, documents, professional relationships, business interests, and family governance into one platform, Strad helps advisors deepen client relationships while unlocking new growth opportunities.

Exclusive to Strad Users

Rainmaker

Strad's proprietary mobile prospecting application that helps advisors identify and convert new clients more efficiently.

Through this partnership with FIG, advisors can now deliver a Family Office experience to everyday households, not just ultra-wealthy families. Strad combines client engagement, document management, collaboration tools, and business intelligence into a single platform designed to help advisors deliver deeper service and accelerate growth.

CORE PLATFORM CAPABILITIES

Family Office

- Multi-generational family mapping
- Relationship diagrams and household view
- Trusted advisor collaboration tools

Business Office

- Business entity structure and overview
- Insurance and risk coverage visibility
- Professional advisory network management

Rainmaker Mobile App

- One-tap lead capture on the go
- Professional network builder
- Instant client invitations

Client Financial Dashboard

- Managed and held-away account aggregation
- Net worth snapshot and financial insights
- Financial reporting across all accounts

Document Vault

- Secure, encrypted document storage
- Version control and audit trails
- Permission-based sharing

Task & Workflow Management

- Collaboration with CPAs, attorneys & professionals
- Client task management and tracking
- Family governance coordination

01 — THE COORDINATION LAYER

Virtual Family Office

A complete household picture,
always at your fingertips

- **Full household visibility**
  Financial and non-financial assets, documents, and relationships unified in one view.
- **Multi-generational mapping**
  Connect family members, beneficiaries, and trusted advisors across generations.
- **Advisor collaboration**
  CPAs, attorneys, and specialists all working inside one shared platform.

02 — THE BUSINESS LAYER

Business Office

Built for advisors who
serve business owners

- **Complete business visibility**
  Entity structure, insurance, fleet, executive teams, and retirement plans — all in one place.
- **Advisor + business side view**
  Left: your advisory team. Right: the full business universe. Every angle covered.
- **Meaningful conversations**
  Uncover wealth opportunities hiding inside your client's business.

03 — THE GROWTH ENGINE

Rainmaker

Mobile prospecting
Exclusive to Strad users

- **Prospect on the go**
  Capture leads, build your network, and send client invitations from your phone in three taps.
- **Family Office in your pocket**
  Instantly demo the full Strad experience to a prospect. no laptop required.
- **Convert conversations faster**
  Turn a first meeting into a new client before you leave the room.

WHY IT MATTERS

Going Beyond the Transaction

Today's clients expect more than isolated policies or accounts. They want: Transparency, Organization, Security and Collaboration across advisors. Strad helps advisors deliver a modern wealth experience that strengthens client loyalty and drives referrals.

Transparency | Organization | Security | Collaboration

Strengthen client loyalty
Deeper relationships through complete household visibility

Drive more referrals
Differentiate your practice in every competitive situation

Increase firm valuation
Stickier client relationships that compound over time

FOR PARTNERSHIP SUPPORT

Get in Touch

FIGSUPPORT@STRAD.COM

GET IN TOUCH

Schedule a Demo

BOOK HERE

HAVE A QUESTION?

Speak with an Expert

SUPPORT LINK