

WEALTH MANAGEMENT

Your Clients Trust You With Their Wealth. **Not Email Attachments.**

Every client. Every portfolio. Nothing leaves home.

Onboarding packs, KYC files, portfolio reports and change requests, managed inside the Microsoft 365 you already own and shared through a secure client portal.



\$0

extra license cost for each client, CPA or attorney using your portal

20 min

to onboard 50 external users, instead of 5 days by hand

80%

cost savings vs. custom development

SOUND FAMILIAR?

Where Client Documents Break Down

Client files live in five places

The signed agreement in one inbox, last year's statements on a shared drive.

Requests stall in inboxes

Address and beneficiary changes travel as PDFs, and no one can see where they're stuck.

Every exam means a week of digging

Approvals, versions and policy sign-offs are scattered across email and spreadsheets.

WHAT TITAN DOES FOR WEALTH FIRMS

Five Capabilities, One Platform, Your Tenant

A Client Document Vault

- One organized file per household and account
- Version control on IPS, agreements and plans

B Requests & Approvals

- No-code routes: advisor, ops, compliance
- E-signatures and time stamps at every step

C Reporting & Data Ops

- Statements and reports centralized by period
- Checked and approved before clients see them

D Client & Partner Portal

- Clients, CPAs and attorneys join as guests, no license
- Each person sees only what you share, every view logged

E Policies & Compliance

- Code of ethics and procedures with read-and-acknowledge
- Attestation reports ready when an examiner asks

See your client workflows running in Titan.

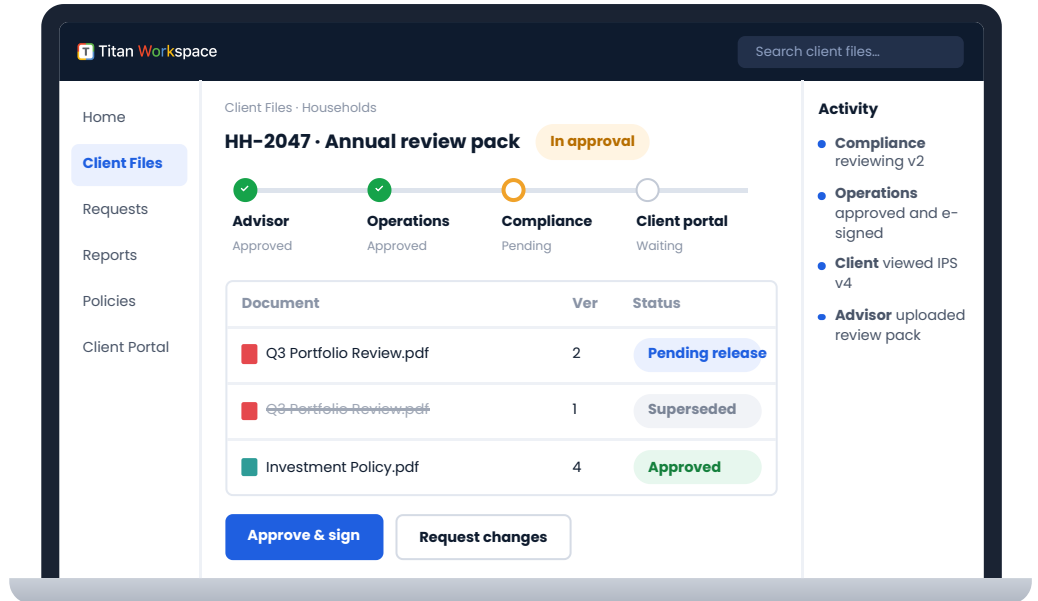
A walkthrough built around your onboarding, review packs and approval routes.

Book a Demo →

SEE IT IN ACTION

A Client Review Pack, From Draft to the Client's Portal

- 1 Multi-step sign-off**
Advisor, operations and compliance approve in order, with no email chains.
- 2 One current version**
v2 goes to the client; v1 is superseded and archived automatically.
- 3 Full audit trail**
Every view, edit and approval is recorded with name and time.



Illustrative view of a client review pack in Titan Workspace

CUSTOMER SUCCESS STORY · PRIVATE WEALTH

Sanctum Wealth Runs Its Document Management on Titan, Inside Its Own Tenant

- ✓ Mumbai-based wealth manager serving high-net-worth clients in India and abroad
- ✓ Built on the Royal Bank of Scotland's former India private banking business
- ✓ Uses Titan's Document Management to keep client documents organized and version-controlled

DMS

Titan module in use, in their own tenant

0

files moved to a third-party cloud

BUILT FOR EVERY KIND OF WEALTH FIRM

Private Wealth

Family Offices

RIAs & Advisors

Asset Management

Private Banking

Multi-Family Offices

BUILT IN: Version history · Approval trails · Per-person access · Policy attestations · Data stays in your region

WHY TITAN

- ✓ **Your tenant, your data**
Client data never leaves your Microsoft 365 or region.
- ✓ **No per-guest fees**
Clients and outside advisors join at no extra license cost.
- ✓ **Works with your CRM**
Titan manages the documents and approvals around it.

Every client. Every portfolio. Nothing leaves home.

See Your Client Workflows Running in Titan

A walkthrough built around your onboarding packs, your review cycle and the questions your last examiner asked.



Scan or click to book a demo