Code. Set.



PILOT PLAN · FAMILY OFFICES AND INVESTMENT FIRMS

Family office digital twin. 90-day pilot plan.

One private model of the family's entities, accounts, mandate, tax residencies and past deals. It reads every document, email and data room together, and tells you what to ask before you sign.

FOR PRINCIPALS, CEOS AND CIOS OF FAMILY OFFICES, HEADS OF LEGAL, TAX AND FINANCE

Your capital runs on paper. Read by hand, in silos.

Data rooms, side letters, tax opinions, bank statements, board packs, capital calls. Legal reads its part, tax reads its part, finance reads its part, separately and against the clock. Nobody reads it all together, against what the family actually owns and wants.

DATA ROOMS
Shareholder agreements, accounts, contracts, disclosures

ENTITIES
Holding companies, trusts, foundations, in several countries

BANKS · CUSTODIANS
Statements, positions, capital calls, fund reports

INBOX
Hundreds of emails a day from banks, counsel, managers

TAX
Residencies and rules for every family member

MANDATE
The family constitution, the investment policy, past deals

What that looks like, in the demo family office

Varela Family Office, DIFC, three generations. Demo names and figures are illustrative.

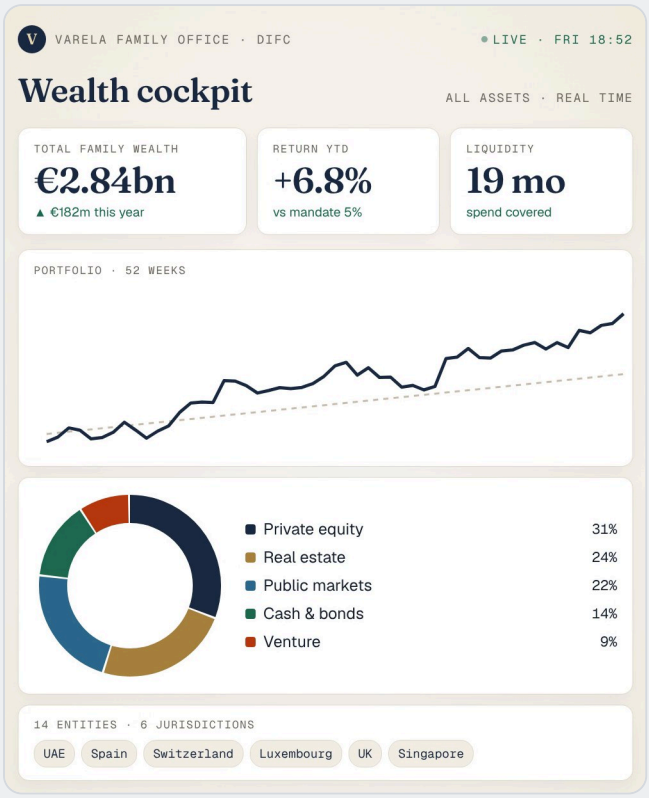
Friday, 18:40. Project Atlas lands: a €40m Series B, a 512-page data room, an answer needed by Monday.

Footnote 14, page 245 of the shareholders' agreement: a 2x liquidation preference. On any exit under €120m, the family gets €0.

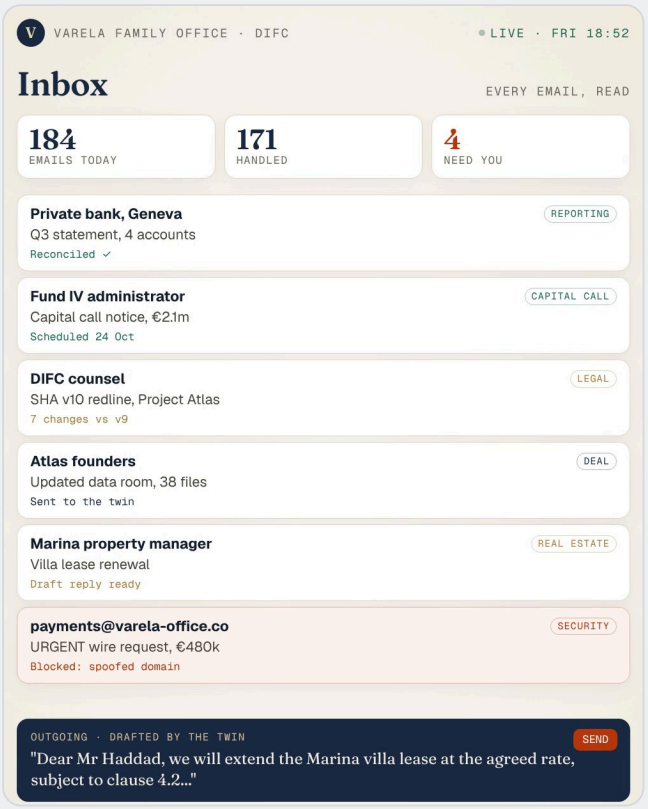
Revenue up 31% in Q4, mostly from two related-party customers, in note 9 of the management accounts.

Two lawsuits naming a co-founder, in 2023 and 2025, not disclosed in the data room.

Every asset, every entity, every email, in one view.



WEALTH COCKPIT: TOTAL WEALTH, RETURN AGAINST THE MANDATE, LIQUIDITY, ENTITIES AND JURISDICTIONS



THE INBOX READS ITSELF: SORTED, RECONCILED, REPLIES DRAFTED, A SPOOFED €480K WIRE REQUEST BLOCKED

The twin knows

- The family constitution and investment mandate
- Every holding entity, trust and account
- Tax residency of every beneficiary
- Every past deal and how it ended

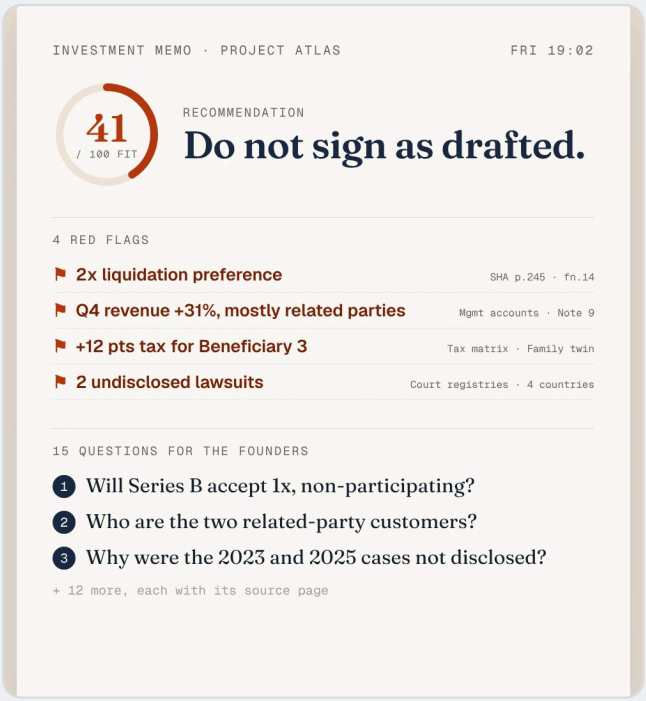
The twin watches

- Wealth, return and liquidity, live
- Capital calls and fund reports
- Incoming email from banks, counsel and managers
- Every portfolio company after the deal

Four AI agents read every line. Each answer cites the page.



LEGAL, FINANCE, TAX AND COMPLIANCE AGENTS OVER THE WHOLE DATA ROOM, EACH FLAG WITH ITS SOURCE



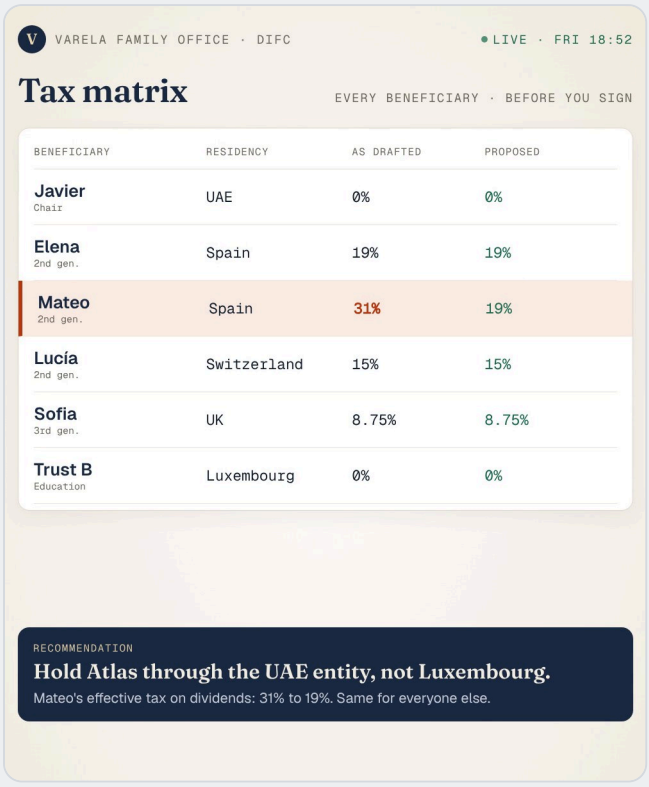
THE 2-PAGE MEMO: A FIT SCORE AGAINST THE MANDATE, THE RED FLAGS AND THE QUESTIONS FOR THE FOUNDERS

Every clause scored. 38 documents and 2,914 clauses in the demo, ranked by risk to the family.

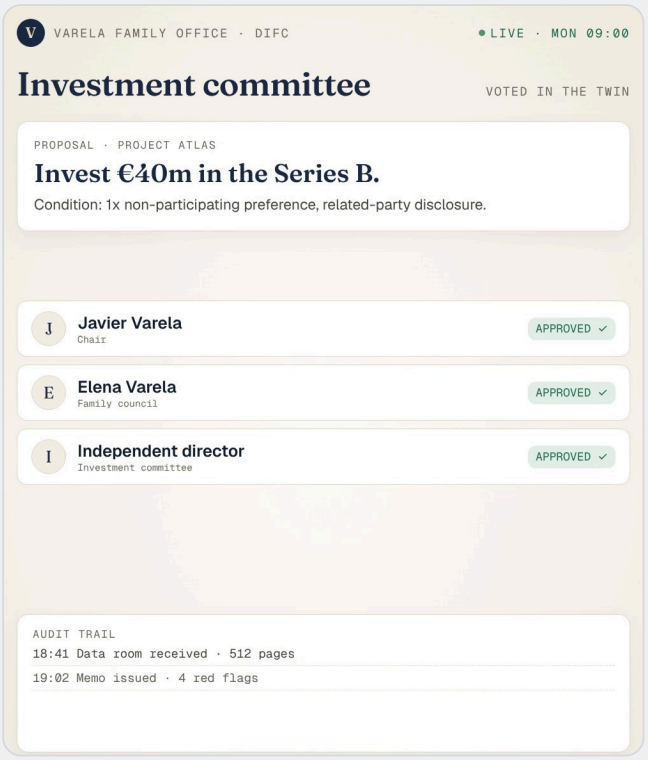
A clear call. "Do not sign as drafted", with 15 questions for the founders, each tied to its source page.

Ask it anything. "What do we get if they sell for €100m?" comes back as €0 under the current terms, with the clause it relies on.

Tax for every family member, before anyone signs.



TAX MATRIX: THE EFFECT OF THE STRUCTURE ON EACH BENEFICIARY, AS DRAFTED AND AS PROPOSED



INVESTMENT COMMITTEE: APPROVED WITH CONDITIONS, VOTED AND RECORDED IN THE TWIN



PORTFOLIO WATCH: RUNWAY, REVENUE, OCCUPANCY AND CAPITAL CALLS AFTER THE DEAL

Structure before signature. Holding Atlas through the UAE entity instead of Luxembourg takes one beneficiary's tax on dividends from 31% to 19% in the demo, and leaves everyone else the same.

A full audit trail. Who saw what, which flags were raised, who voted and on what conditions.

It keeps watching. Burn above plan, a capital call due, a covenant close to its limit: flagged before the quarterly report.

05 · HOW IT RUNS AND UNDER THE HOOD

Inside your own perimeter. The code and IP are yours.

01	**Connect**	Read-only links to email, the document store, data rooms, custodians and banks, the accounting system and fund administrators.
02	**Read**	Document AI over PDFs, scans, spreadsheets and email, in English, Arabic, Spanish and other languages.
03	**Model**	An entity and ownership graph of the family: people, entities, accounts, residencies, the mandate and every past deal.
04	**Analyse**	Legal, finance, tax and compliance agents grounded in the family's own documents. Every answer cites its page.
05	**Decide**	Memos, investment committee votes and conditions recorded with an owner. Nothing is sent or signed without a person.

Installation options

01 · CLOUD

Your Azure, AWS or Google Cloud tenant, in the region you choose.

02 · ON-PREMISES

Your servers, on Kubernetes or virtual machines.

03 · AIR-GAPPED

No outbound traffic. Local models, updates delivered offline.

Security and ownership

ACCESS

SSO over SAML or OIDC, roles per family member and adviser.

AUDIT

A log of every view, question, flag and decision.

OWNERSHIP

The code and the IP built for you are yours. A named delivery lead supports it.

One family office. 90 days.

The twin is usable from week six. In weeks seven to twelve your team runs a live deal and the monthly reporting through it.



WEEK 1 · WEEK 6 · TWIN LIVE · WEEK 12

WEEKS 1 TO 2

Connect

Read-only access to the sources in scope, the family's key documents and one page of the questions the twin must answer.

WEEKS 3 TO 6

Build and test

The entity graph, the cockpit and the agents, tested against a deal you have already closed, so you can check the twin against what you know.

WEEKS 7 TO 12

Run a live deal

A real data room, the inbox and the monthly reporting run through the twin, with your advisers in the loop.

What we need from you	What you get
Read-only access or exports from the sources in scope	A working twin in your cloud, on your servers or air-gapped
The constitution, the mandate and the entity chart	Cited memos and a tax view per beneficiary
One closed deal and its data room, for testing	A decision log with owners and conditions
A sponsor and an operations lead, about an hour a week	The code and configuration, yours

07 · NEXT STEP

Tell us about your family office.

Codset builds digital twins end to end: connectors, document AI, the entity graph, the agents and the decision workflow, inside your own perimeter.

START THE PILOT CONVERSATION

Entities, documents, one deal. That is enough to start.

Send the form at

codset.com/family-office-twin

or email **info@codset.com**. The people who would build it reply.



CONTRACTS REVIEWED: EVERY DOCUMENT IN THE DATA ROOM RANKED BY RISK, WITH A MAP OF ALL CLAUSES

EXAMPLES IN THIS PLAN COME FROM A DEMO FAMILY OFFICE. DEMO NAMES AND FIGURES ARE ILLUSTRATIVE, NOT CLIENT RESULTS.