

At **C/D/H** we have two **passions** –
our **clients** and their **technology needs**.

C/D/H Family Office consultants design solutions that motivate, inspire, and empower individuals to drive organizations to new heights.

We know the **complexity** of your business. We understand your **challenges**. We have the family office **experience** and IT **advice** you are looking for as your family office adapts to new demands for increased transparency and evolving technologies.

Modernizing **family office technology** to meet customer expectations is what **C/D/H** has been doing for over 25 years. As a result of our work with family offices, we have developed user-centric apps that give you a holistic view of Clients, Partnerships, Trusts, Entities, and Ownership so you can focus on your clients

- ✓ Microsoft Gold Partner
- ✓ Top 200 Microsoft US Partner
- ✓ Four and a half star rating on MS Pinpoint
- ✓ CIE certified
- ✓ S&EDPS, AZDPS, DDPS, PVDPS partner

Data Mart

Designed from the LP's Perspective

- A data governance methodology
- ETL and data quality rules
- Hierarchies for the most common data objects
- Integrates data from Dynamics, Investran, SharePoint
- Robust reporting capability

Portals

- Document Management
- Enterprise Portal

IT Services

- Infrastructure
- IT Family Services
- Security

Cashflow Forecasting Application

Features

- Supports Family Office Structures
- Model Alternative Investments
- Build Portfolios
- Build Portfolio Plans
- Run Scenario Modeling
- Configurable Audit and Alerting

Background

- Initial idea — Family Office based in Grand Rapids, MI
- Procedural Redundancy
- Modeling Flexibility
- Scenario Analysis
- Modern Technology – replace Excel mode

Project Management

- Technology Roadmaps
- Project Management
- Agile Methodology
- Workflow Business Process Automation



Contact Us:



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DETROIT