

CASE STUDY · SINGLE FAMILY OFFICE

Consolidated Intelligence & Sovereign AI Deployment

Anonymised — details representative of SynexumLabs' delivery pattern in the family office segment.

CLIENT PROFILE

A single-family office based in a major North American financial centre, managing approximately \$400M across 12 jurisdictions, an 8-person operating team, and a portfolio spanning public markets, private equity, real estate, and two operating businesses.

THE PROBLEM

The principal was making nine-figure decisions on numbers that were 60+ days stale.

- › Consolidated reporting arrived quarterly, sixty to ninety days after quarter-end. By the time the principal saw the numbers, they described a world that no longer existed.
- › Every structural question routed to outside counsel. Response times measured in days. Legal spend accelerating.
- › Junior team members were pasting confidential deal memos into public AI tools. The General Counsel knew. The response was a full AI ban — which killed productivity and did nothing about the underlying pressure.
- › Portfolio company anomalies surfaced on page 14 of a monthly PDF, weeks after the fact. Two operating businesses had missed early-warning signals that later became escalations.

THE ACTION WE TOOK

A three-week Discovery engagement mapped the family's full data landscape — every custodian, every fund administrator, every operating company reporting cadence, every entity in the structure, every workflow inside the office. Deliverables: an architecture blueprint, an integration map, a prioritised roadmap. Investment credited toward the subsequent engagement.

THE ARCHITECTURE WE BUILT

Built on our Sovereignty-First Data Architecture — four disciplined tiers.

TIER 1 · The Vault — local, sovereign

Deal history, trust structure, holdings, family communications — processed by small specialised models running entirely on hardware inside the family's own environment. Nothing exits.

TIER 2 · The Sanitised Pipeline — secure sandbox

For heavier reasoning tasks, a deterministic layer strips every family identifier, dollar figure, and entity reference before any query leaves the perimeter.

TIER 3 · The Managed Agent Layer — bounded execution

Repeatable workflows — custodian reconciliation, portfolio anomaly detection, structural query answering — running with defined inputs, defined outputs, full audit logs.

TIER 4 · Public Research — market context

Market data and macro context, kept fully separate from any client data.

WHAT CHANGED FOR THE CLIENT

Delivered inside 14 weeks of build. First usable system in the principal's hands at week 9.

- › Consolidated reporting shifted from quarterly to weekly. Daily refresh possible at no additional compute cost.
- › A natural-language query interface now sits in the principal's browser. Structural questions previously routed to outside counsel are answered in seconds, with the underlying documents cited.
- › A live alerts layer watches every portfolio company's monthly reports, flags anomalies, and produces a board-ready summary the day reports arrive.
- › Every team member has an approved, sovereign AI workspace. Third-party AI use dropped to zero. The GC signed off on the architecture, not despite the AI but because of it.

MEASURED, DEFENSIBLE, COMPOUNDING

METRIC	BEFORE	AFTER
Consolidated reporting lag	60–90 days	5 days
Structural question response	2–5 business days	Under 30 seconds
Outside legal spend on structure	~\$180K per year	~\$40K per year
Portfolio issue-detection delay	6–8 weeks	24–48 hours
Sensitive docs on third-party AI	Ongoing exposure	Zero — enforced
Team hours on data re-keying	~14 hours per week	Under 1 hour per week

“I used to make decisions on what happened. Now I make decisions on what's happening.”

— Principal · six months into deployment

WHY WE COULD DELIVER IT

- › Engagement led by founding partners — not a delivery team handed the account after the sale.
- › Chief AI Transformation Officer with a shipped, air-gapped Document Intelligence platform in production.
- › Founding partner from Coigne Capital publishing on family governance and cross-border capital structuring.
- › Delivery leadership drawn from Al Jazeera Media Network, Deloitte, and Oracle.
- › SynexumLabs benchmarks: 85% average cycle-time reduction · 99.2% automated-decision accuracy · 3.2× throughput · 6-month typical ROI.

If your family office is running peacetime infrastructure and the pattern above is familiar, a 30-minute discovery call with our founding partners will give you an honest assessment of fit.

No pressure. No chase. synexumlabs.com · Strategy That Ships