

SYNEXUMLABS · GOVERNED AI & AUTOMATION

Sovereign Intelligence for Family Offices

Custom, live, automated — built for families that
cannot afford to get AI wrong.

A Coigne Capital company

Why we are having this conversation

01 How a family office should adopt AI — and why it differs from an enterprise

02 What a live data intelligence layer looks like inside a family office

03 Who SynexumLabs is, and why you would introduce us

The universal operational reality

Whether SFO or MFO, every family office we meet faces the same five constraints.

Fragmented data

Custodians, prime brokers, fund administrators, banks, operating companies — each in its own format and cadence.

Delayed truth

Consolidated numbers arrive 30 to 90 days after quarter-end. They describe a world that no longer exists.

Jurisdictional spread

Trusts, LLCs and holdings across 5, 10, 20+ jurisdictions. No single team member holds the full picture.

Casual AI use

Sensitive documents pasted into third-party interfaces. Nobody is comfortable; nobody has an approved alternative.

Cost of every question

Every structural, tax or investment question routes to an outside advisor — expensive, slow, sometimes conflicted.

These are the constraints our founding partners write and speak about publicly. This is what we live inside.

What we build

A live, unified, secure intelligence layer above the family office's entire data landscape — one place to see, ask, and act.

Live

Refreshed in hours, not months.

Unified

Every custodian, bank, fund, operating company and entity register in one place.

Secure

Sovereign by design, not by policy.

Interactive

The principal asks in plain language and gets answers with the numbers underneath.



The centralised dashboard

Wealth at a glance

Total AUM across all vehicles, movement since last period, key exposures.

Live alerts

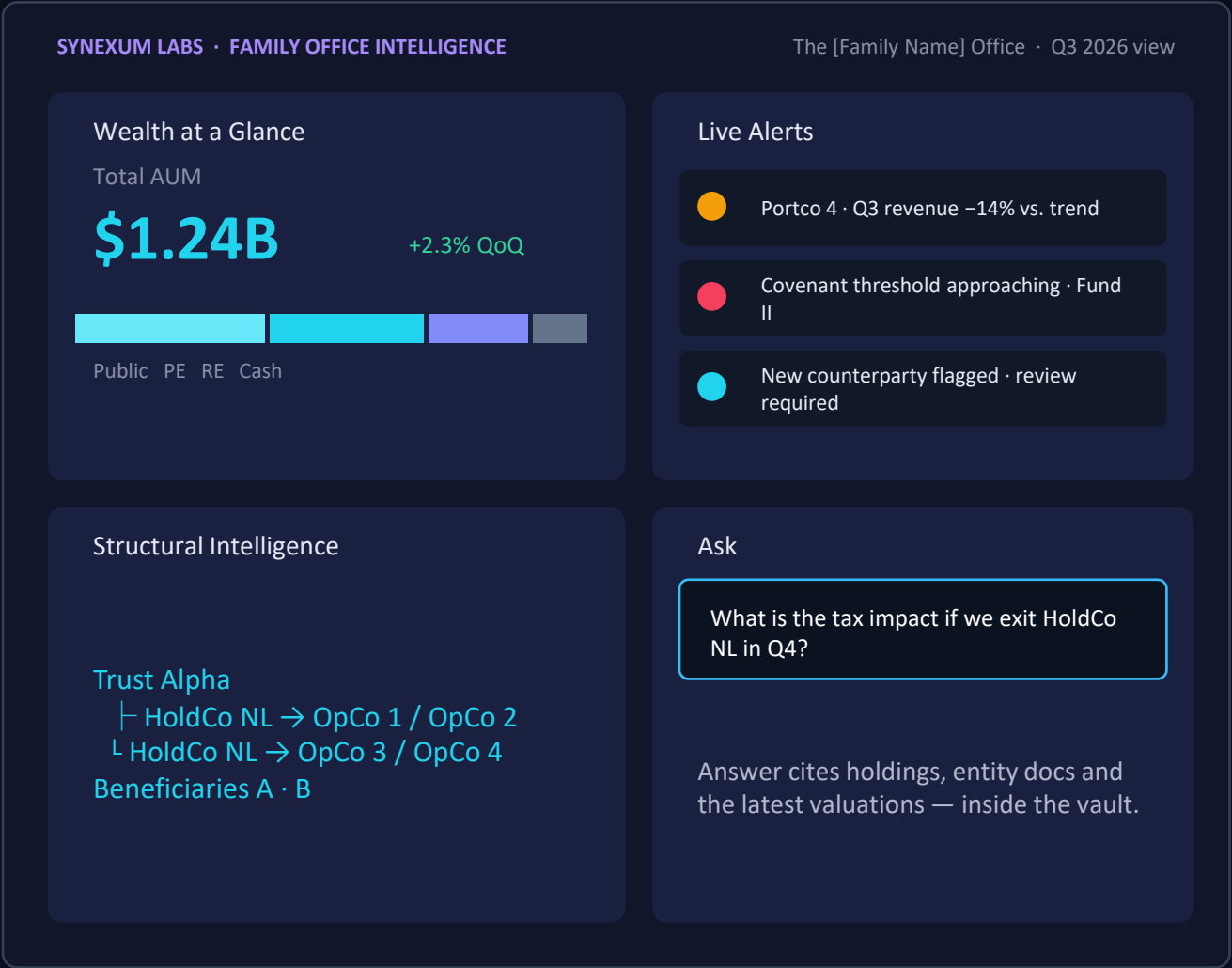
Portfolio anomalies, covenant risks, unusual counterparty behaviour.

Structural intelligence

Which entity holds what, what happens if X is sold from Y, who approves.

Ask pane

A question in plain English, answered with the underlying data as source.



How we make it live

01

02

03

04

Sources

Custodians, brokers, funds, operating companies.

Ingestion

Secure API, file exchange, or in-tenancy ETL.

Reconciliation

Normalised, deduplicated, reconciled hourly.

Dashboard

Change-triggered updates and routed alerts.

Direct integrations with custodians, prime brokers, fund administrators and family-owned operating systems; continuous reconciliation hourly rather than quarterly; and when a covenant, KPI or valuation moves, the dashboard reflects it and the relevant team member is notified.

How we make it custom

No family office is templated, so no product should be.

Custom data model

Built around the family's actual entity structure, not a generic chart of accounts.

Custom taxonomy

The family's own language for holdings, projects, jurisdictions and family members.

Custom workflows

Reflects who actually decides what, and who must see what before a decision.

Custom access

Role-based: the principal sees everything, family members what is appropriate, staff what they need.

How we make it automated

Data lands on its own.

Custodian statements, bank feeds and portfolio reports flow into one place — your team stops re-keying them.

Numbers check themselves.

Mismatches are caught and flagged before they ever reach a human eye.

Reports draft themselves.

Board packs and monthly summaries are ready for review the day the data arrives, not weeks later.

Routine questions get answered.

Structural, tax and portfolio queries handled inside your environment — no outside call needed.

Only what matters reaches you.

Unusual movements are routed to the right person with the context they need to act.

Sovereignty-first data architecture

TIER 4

Public research

Public search and macro data collection, kept fully separate from any client data. Market context only.

TIER 3

Managed agent layer

Risk parsing, document triage and compliance checks inside bounded workflows: defined inputs, defined outputs, full audit logs.

TIER 2

Sanitised pipeline

Before questions leave your environment, the system removes every identifying detail — names, dollar figures, entity references, family markers. Only the anonymised question travels.

TIER 1

The vault — local, sovereign

Deal history, trust structure, holdings and family communications processed on the family's own hardware. Nothing exits the perimeter.



SynexumLabs

What we are

A governed AI and automation firm building institutional-grade decision infrastructure. Founded by principals from Coigne Capital Inc., with delivery leaders drawn from Al Jazeera Media Network, Deloitte and Oracle.

Positioning

Strategy That Ships — the operating system for digital transformation.

Who we serve

Financial services, healthcare, government, enterprise — and now, deliberately, family offices.

How we work

Governed delivery model, living systems architecture, modular cell development, institutional-grade sustainment.

The people behind this engagement

SS

Sivakumar (Shiva) Swaminathan

Chief AI Transformation Officer · Founder, Kalkia Évolution IA. Panellist, Government of Canada AI consultation, 2026.

AK

Amit Kumar

Managing Partner · Fractional CTO. Five years as Senior Technical Product Manager at Al Jazeera Media Network. MBA, CSPO.

SP

Sourabh Purwar

Managing Partner · Co-founder, Happy People AI. Former Senior Consultant at Deloitte; prior Senior UX Researcher and international lead at Oracle. MBA.

SAP

Sergio A. Paier

Managing Partner · Founder, Coigne Capital Inc. Wealth strategy, cross-border governance and succession. CIRO-regulated advisor. MSc, HEC Montréal.

MA

Matt Ambrose

Director of Business Development · Founder, MA Consulting. Eighteen years in international trade across Asia and Latin America. Mexico City.

Combined 40+ years across AI, product engineering, cross-border finance and enterprise UX — every member has shipped inside institutional-grade environments.

Proof we can deliver

85%

reduction in automation cycle time

99.2%

accuracy on automated decisions vs.
a 94% manual baseline

3.2×

throughput, without adding
headcount

6 mo

typical ROI on institutional
engagements

Compliance reporting

A 40-hour weekly manual process became real-time and audit-trailed. 92% time reduction, zero compliance gaps.

Administrative overhead

Over 60% of admin tasks automated. Manual coordination down 45%, with no new admin hires.

Enterprise UX redesign

Bounce rate down 42%, session duration up 65% — behaviour-driven, not opinion-driven.

Why family offices, why now

01

The audience is primed

Principals and CIOs have been told for two years that AI matters. Almost none have moved past casual experimentation. They need a serious partner.

02

The architecture fits

Small teams, large complexity, personal privacy exposure. Sovereign-first design is exactly what this profile demands.

03

The window is now

The gap between families adopting deliberately and families experimenting casually widens every quarter. Whoever builds the sovereign foundation first compounds the advantage.

What premium customization means

Not a product. A bespoke architecture built around one family.

Discovery

We map entity structure, data sources, workflows and privacy constraints first.

Design

No two dashboards, data models or agent workflows are the same.

Delivery

Their cloud, their on-prem, their air-gapped environment. Their choice, our engineering.

Partnership

The more the system runs, the more useful it becomes. Monthly investment stays predictable while the system takes on more of the team's routine work every quarter.

Our engagement model

2–3 WEEKS

3–4 WEEKS

8–14 WEEKS

ONGOING

Discovery

Operations audit, data landscape, priorities.

Design

Architecture, integration specs, governance.

Build

Iterative build, first usable system in ~60 days.

Operate

Monitoring, optimisation, continuous improvement.

Clear specifications before any build begins, continuous visibility during it, and an operate phase that does not end at handover — we do not deliver and disappear.



Investment ranges

ENGAGEMENT	RANGE	SCOPE
Discovery engagement	\$10K – \$20K	Fixed fee, 2–3 weeks. Architecture blueprint, integration map, prioritised roadmap.
Live data intelligence dashboard	\$75K – \$150K	By data source complexity and family entity structure.
Ongoing sustainment	\$2.5K – \$7.5K / mo	By system footprint and cadence of change.
Premium bespoke engagements	\$150K – \$500K	Multi-workstream: dashboard, deal intelligence, structural intelligence. Priced per scope.

Every engagement is led by a named Managing Partner. No junior handoffs — the people who sell the engagement are the people who deliver it.

Recommended next step

One introduction where the operational pain is real and the principal is open to a serious conversation.

01

Introduce

You make one introduction. Your reputation is the trust we start with, so that engagement gets our best work.

02

Discovery call

Forty-five minutes, no cost. We listen for real operational pain, not for a buying signal.

03

Discovery engagement

If there is fit, we scope it. If not, we close cleanly — your reputation is protected either way.

Thank you. Ready when you are.