

SYNEXUM LABS · GOVERNED AI & AUTOMATION

Sovereign Intelligence. Living Architecture.

An AI and intelligence advisory firm with a development engine — architects of living data systems for institutions that cannot afford to get AI wrong.

Family Offices · Financial Advisory & Insurance · Healthcare · Government · Enterprise

A Coigne Capital company · Strategy That Ships

What this conversation covers

01

Who we are

An intelligence advisory practice with an in-house development engine — not a body shop, not a product vendor.

02

How we think

Living, sovereign data architecture that observes, decides, acts, and evolves with the client.

03

Where the gap is

The market is split between strategy that never ships and software that never understands the institution.

04

How it lands by vertical

Family offices, advisory & insurance, healthcare, government, and enterprise operations.

05

How we engage

Discover → Design → Build → Operate. Founding partners stay on the work.

Who Synexum Labs is

A governed AI and automation firm that designs institutional decision infrastructure — then builds and operates it.

What we are

An intelligence advisory firm with a development engine. We architect first. We ship second. We stay to operate.

What we are not

Not an IT staff-augmentation shop. Not a generic chatbot vendor.
Not a strategy memo that ends at the slide.

Who we serve

Institutions that live under privacy, fiduciary, and audit pressure: family offices, financial firms, healthcare, government, enterprise.

Where we sit

A Coigne Capital company. Advisory on structure and capital, Synexum on living systems that make those structures run.

The positioning that matters

Clients do not need more software. They need an intelligence layer that understands their process, their risk, and their language — then a team that can actually build it.

01

Intelligence advisory

We start with the operating reality: entities, workflows, data cadence, decision rights, compliance surface. The architecture is the product of that diagnosis.

02

Custom intelligence design

No two clients share a data model, taxonomy, or approval path. We design to the client's language — not a generic chart of accounts.

03

Development engine

The same partners who design the system ship it. Full-stack, AI/ML, integrations, DevOps, QA — inside a governed delivery model.

04

Living architecture

Systems that observe, decide, trigger, and learn. Monthly investment stays predictable while the system absorbs more routine work each quarter.

The gap most institutions are stuck in

Strategy firms

Produce roadmaps, operating models, and AI principles. Rarely own the system that has to run on Monday morning.

Software vendors

Sell a product. Force the institution into a template. Governance is a policy PDF, not an architecture.

Public AI tools

Fast, cheap, and leaky. Sensitive files land in third-party interfaces because no approved alternative exists.

Internal IT

Keeps lights on. Rarely has the mandate, the models, or the partner-level judgment to redesign decision infrastructure.

The Synexum position

We sit in the gap between those four options.

We diagnose the intelligence requirement. We design the architecture around the client's actual processes. We build the system on their perimeter. We operate it so it compounds.

Strategy that ships. Engineering that is governed. AI that is sovereign by design — not by policy.

Where the market is open — and why now

Demand for AI is universal. Demand for AI that can survive an audit, a regulator, a family principal, or a privacy counsel is not being met.

Sovereignty vacuum

Family offices and regulated firms are experimenting in public tools because no approved sovereign layer exists. The first serious architecture becomes the default.

Stale truth

Consolidated numbers still arrive 30–90 days late. Decisions are made on a world that no longer exists. Live intelligence is the new baseline.

Compliance as a person

In mid-size firms the CCO is the system. One absence creates a gap. The market needs compliance as infrastructure.

Strategy / build split

Big-4 decks and offshore builds rarely share a room. Institutions pay twice and still own neither the architecture nor the outcome.

Private-model shift

Public LLMs captured attention. Private, perimeter-bound intelligence will capture the institutional spend.

Lean teams, large complexity

8-person family offices and 14-advisor firms cannot hire a platform team. They need a partner who architects and ships without adding headcount.

Living systems, not static software

Digital transformation, as we practice it, is decision infrastructure: systems that observe what is happening, decide what matters, trigger action, and learn from outcomes — while remaining governed.

1

Observe

Ingest custodians, CRMs, operating systems, documents, and event streams. Refresh in hours, not quarters.

2

Decide

Apply the client's rules, taxonomies, and thresholds. Surface only what a human should see.

3

Act

Draft the pack. Route the alert. Answer the structural question. Leave an audit trail.

4

Learn

Every cycle tightens reconciliation, exception logic, and workflow. The system compounds.

Sovereignty-first data architecture

Privacy is architectural, not promised. Sensitive material never leaves the perimeter unless it has been stripped of every identifying detail.

TIER 1

The Vault — local, sovereign

Deal history, KYC, trust structures, holdings, client files, family communications. Small specialised models run on hardware inside the client's environment. Nothing exits.

TIER 2

Sanitised pipeline — secure sandbox

When a question needs deeper reasoning, a deterministic layer strips names, dollar figures, entity references and identifiers. Only the anonymised question travels.

TIER 3

Managed agents — bounded execution

Repeatable workflows — reconciliation, suitability, anomaly detection, renewals — with defined inputs, defined outputs, and complete audit logs.

TIER 4

Public research — market context only

Macro data, product benchmarks, public search. Kept fully separate from any client corpus.

Custom. Live. Automated.

Custom

- Data model built on the client's actual entities, products, and jurisdictions — not a generic schema.
- Taxonomy in the client's language for holdings, segments, policies, and people.
- Workflows that mirror who decides, who reviews, and who must see what.
- Access by role: principal, advisor, compliance, staff — nothing more.

Live

- Direct integrations with custodians, CRMs, carriers, banks, fund admins, operating systems.
- Ingestion by API, secure file exchange, or in-tenancy ETL.
- Normalised, deduplicated, reconciled on an hourly cadence — not a quarterly close.
- Change-triggered updates and routed alerts the same day the number moves.

Automated

- Data lands on its own. Teams stop re-keying.
- Numbers check themselves. Mismatches flag before a human sees them.
- Reports and board packs draft themselves the day the data arrives.
- Routine questions answered inside the environment. Only exceptions reach a person.

The operating system we install

Built on a Core/Grid + Modular Cells model: domain units move with autonomy and speed, while governance is inherited from the centre.

Governed delivery

Decision ownership, cross-border compliance, tooling integration, and a documented governance framework from day one.

Living systems architecture

The intelligence layer that connects data, decisions, and execution. Observe, decide, trigger, learn.

Scalable platform engineering

Full-stack development, AI/ML integration, DevOps and QA. Global execution capacity inside the governance frame.

Modular cell development

Domain cells for Finance, Operations, Analytics, Compliance. Autonomy without losing control.

Institutional sustainment

Monitoring, optimisation, compliance sustainment, continuous improvement. We do not deliver and disappear.

Document intelligence

Air-gapped processing of contracts, KYC, deal memos, and board packs — the same architecture already shipped in production.

One discipline, five operating realities

The architecture is shared. The data model, taxonomy, workflow, and audit surface are never shared. That is the point.

01 Family offices

Live consolidated wealth, structural intelligence, sovereign workspace. Decisions on what is happening — not what happened.

02 Advisory & insurance

Advisor productivity, compliance as a system, continuous client insight. Suitability with an audit trail.

03 Healthcare

Deployment velocity inside payer and provider constraints. PHI stays in the vault. Release pipelines that do not wait on heroics.

04 Government

Sovereign by design, procurement-ready governance, audit-ready agents. Public research separated from citizen data.

05 Enterprise operations

Admin work replaced with automation. Decision rights encoded. Throughput up without headcount.

Family offices — sovereign intelligence

Fragmented data

Custodians, primes, fund admins, banks, operating companies — each in its own format and cadence.

Delayed truth

Consolidated numbers 30–90 days after quarter-end. The principal decides on a world that no longer exists.

Jurisdictional spread

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

Casual AI leakage

Confidential memos pasted into public tools. The GC bans AI. Productivity dies. The pressure remains.

What we put in the principal's hands

A live intelligence layer above the entire data landscape. Wealth at a glance. Structural intelligence. Live alerts. An ask pane answered with the numbers and documents underneath.

Representative outcome: reporting lag 60–90 days → 5 days. Structural questions 2–5 days → under 30 seconds. Outside legal spend on structure ~\$180K → ~\$40K. Third-party AI exposure → zero, enforced.

Financial advisory & insurance — compliance-native

Advisor time

Licensed advisors lose 30–40% of the week to KYC, disclosures, renewals and paperwork — 12–16 hours per advisor, per week.

Compliance risk

Suitability, disclosures, recommendation trails and CE tracking live in email, PDFs and CRM notes. One audit exposes the gaps.

Stale client insight

Annual review cycles. Between them, market moves, life events and lapses go unnoticed — and unaddressed.

Three-person bottleneck

Senior advisor, CCO and ops lead absorb every question. Response times measured in days.

What changes

Advisor-facing intelligence inside the workflow. Compliance-native audit trails. Data stays on the firm's hardware. Representative outcome: weekly compliance 40 hours → 3 hours (92%). Advisor admin 30–40% → 12–15%. Suitability queries 24–72 hours → under 60 seconds. Zero new admin hires. Zero compliance gaps.

Healthcare, government, enterprise

Healthcare

THE GAP

Payer and provider suites still ship on heroics. PHI cannot travel. Release cycles wait on manual gates. Admin work absorbs clinical and ops time.

THE PROPOSITION

Vault-first document and claims intelligence. Sanitised reasoning for heavier models. Managed agents for intake, coding support, and release automation. Published pattern: 55% faster release speed on a healthcare payer suite.

Government

THE GAP

Agencies cannot paste citizen or classified material into public tools. Procurement wants evidence, not a demo. Sovereignty is a political and legal requirement, not a preference.

THE PROPOSITION

On-perimeter vault. Bounded agents with full audit logs. Public-research tier kept separate. Governance frameworks documented for procurement.

Enterprise

THE GAP

Growing organisations where manual process is the bottleneck. Leaders need ROI, not another portal. Scaling usually means either headcount or loss of control.

THE PROPOSITION

Replace admin work with automation. Modular cells for finance, ops, analytics. Published pattern: 60%+ admin tasks automated, 45% less manual coordination, zero new admin hires, 3.2× throughput.

One proposition, restated for each buyer

Family principal

You will stop deciding on sixty-day-old numbers, and you will stop sending family documents into someone else's model.

Advisory CEO / CCO

Compliance becomes a system. Advisors return to clients. The next audit is a report, not a scramble.

Healthcare operator

PHI never leaves the vault. Releases stop waiting on a hero. Admin work stops eating clinical capacity.

Public-sector sponsor

Sovereignty is designed, not promised. Every automated decision is reconstructable. Procurement can read the architecture.

Enterprise COO

Throughput rises without headcount. Decision rights are encoded. The operating system improves after go-live, not decays.

Measured, not promised

85%

Reduction in automation cycle time

99.2%

Accuracy on automated decisions vs.
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.

Advisor / admin load

60%+ of admin tasks automated. Manual coordination down 45%. No new admin hires to absorb growth.

Family office lag

Consolidated reporting 60–90 days → 5 days. Structural questions under 30 seconds. Third-party AI use to zero.

Enterprise UX

Bounce rate down 42%, session duration up 65%, CTA interactions up 78% — behaviour-driven, not opinion-driven.

How we work

Clear specifications before any build begins. Continuous visibility during it. An operate phase that does not end at handover.

2–3 WEEKS

Discover

Operations audit. Data landscape. Entity and workflow map. Prioritised roadmap. Investment credited toward the subsequent engagement.

3–4 WEEKS

Design

Architecture. Integration specs. Governance framework. Security review. No two dashboards, data models, or agent workflows are the same.

8–14 WEEKS

Build

Iterative build. First usable system typically in the client's hands around week 8–9. Documentation and training included.

ONGOING

Operate

Monitoring, optimisation, continuous improvement. The system takes on more routine work every quarter. We do not disappear.

Principles: governance first · full transparency · work with the client's team, not around it · success metrics defined before build

The people who stay on the work

Every engagement is led by a named founding partner. No junior handoffs. Combined 40+ years across AI, product engineering, cross-border finance and enterprise UX.

Sergio A. Paier

Managing Partner

Founder, Coigne Capital. Cross-border wealth, governance and succession across Canada–U.S.–LATAM. CRO-regulated advisor. MSc, HEC Montréal.

Sivakumar Swaminathan

Chief AI Transformation Officer

Architect of privacy-first, agentic systems. Founder, Kalkia Évolution IA. Panellist, Government of Canada AI consultation, 2026.

Amit Kumar

Managing Partner · Fractional CTO

13+ years in digital transformation and AI-driven product delivery. Five years as Senior Technical Product Manager, Al Jazeera Media Network. MBA, CSPO.

Sourabh Purwar

Managing Partner

Former Senior Consultant, Deloitte — generative AI and delivery transformation for Fortune 500. Prior Senior UX Researcher and international lead, Oracle. MBA.

Matt Ambrose

Director of Business Development

Eighteen years in international trade and partnerships across Asia and Latin America. Founder, MA Consulting. Mexico City.



How engagements are typically scoped

Ranges vary by data-source complexity, entity or advisor count, and sovereignty requirements. Discovery investment is credited toward the subsequent build.

ENGAGEMENT	INDICATIVE RANGE	WHAT IT PRODUCES
Introductory discovery call	No cost · 30–45 min	Honest fit assessment. If there is no fit, we close cleanly.
Discovery engagement	\$5K–\$20K	Architecture blueprint, integration map, prioritised roadmap.
Live intelligence layer	\$60K–\$150K	Dashboard, live data, alerts, ask pane — scoped to sources and structure.
Premium / multi-workstream	\$150K–\$500K	Dashboard plus deal, structural, or compliance intelligence. Priced to scope.
Ongoing sustainment	\$2.5K–\$7.5K / month	Monitoring, optimisation, cadence of change. Predictable, compounding.

Why the window is now

The audience is primed

Principals, CCOs and COOs have been told for two years that AI matters. Almost none have moved past casual experimentation. They need a serious partner, not another tool.

The architecture finally fits the buyer

Small teams, large complexity, personal or regulated data, audit exposure. Sovereign-first design is what this profile actually requires — and generic vendors cannot offer it.

The gap compounds

Families and firms that adopt deliberately are encoding their own corpus. Those that keep pasting into public tools are leaking judgment and falling behind. The distance widens every quarter.

Private intelligence is the spend

Public models captured attention. Institutional budget will concentrate on private, perimeter-bound systems that can be customised, audited, and owned.

Recommended next step

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

01

Book

Thirty to forty-five minutes. Founding partners, not a sales overlay.

02

Discover

We listen for operational reality — data landscape, decision rights, compliance surface — not for a buying signal.

03

Assess

By the end of the call we tell you whether there is fit. If not, we close cleanly. If yes, we scope Discovery.

Not every organisation is the right fit for what we build. That is how we protect the quality of every engagement — and yours.

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