

FOD Resource Hub

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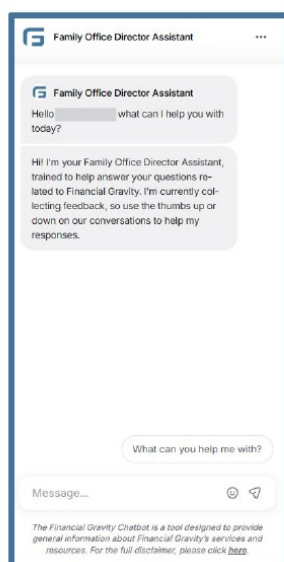
 FG Knowledge Base: Family Office Director Resource Hub

Family Office Director Chatbot: Your AI Assistant

The AI-powered Family Office Director Assistant, built into the Knowledgebase, delivers fast, accurate answers using internal guides, brochures, videos, and more—tailored specifically for Family Office Directors.

Need help planning a seminar, navigating a deal, or calculating an annuity? Just ask!

- “Can you help me prepare for a client seminar?”
- “What’s the next step in the onboarding process?”
- “How do I calculate an annuity payout?”

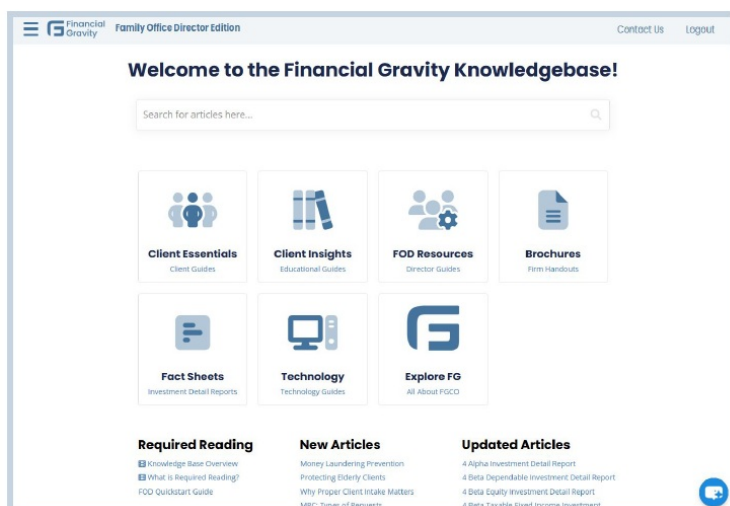


FG Knowledge Base: Family Office Director Resources Hub

Family Office Directors can access our enhanced Knowledgebase. This centralized hub offers a growing library of support guides on technology, processes, onboarding, and more.

This resource hub requires a login to access all its information. When viewing publicly, you will see the client version, and client AI Assistant. After joining our team, you will gain access to these additional resources

Use the built-in search and chatbot to quickly find what you need, our goal is to make everything easy, relevant, and accessible.



This documentation is provided by Financial Gravity Family Office Services, LLC for instructional purposes only. It serves as a general guide to help you understand the onboarding process. Please do not share sensitive information through unsecured channels.



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