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DYNAMIC WEALTH INFORMATION MANAGEMENT SYSTEM

Innovative Software Helps Affluent Families Control and Preserve Their Wealth



You've achieved a level of wealth most people can only dream of. Now your number one priority is controlling and preserving that wealth.

But most wealthy families today have traded true financial control for an illusion of control, says Sherilyn Casiano, founder and CEO of Manhattan-based S.I. Williams Wealth Management, LLC, a multifamily office practice serving investment bankers, hedge fund managers and venture capitalists.

"True control comes only from having a clear, complete and accurate picture of your assets, and a system to keep track of them over time," she says. "If you fail to employ a consistent, systematic process to gather key information, and to authenticate, verify and reconcile that data, you can never gain a complete, clear and accurate picture of your wealth. As a result, your whole legacy is at risk from bad advice, missed opportunities, unprotected assets or intentional fraud."

Enter the Dynamic Wealth Information Management System, or DWIMS. Casiano created it from the ground up to make it easy to give her clients a complete and accurate picture of ALL their wealth, not just invested assets. "I had developed a system to enable me to give my clients a comprehensive and accurate view of ALL wealth activity, but it was very labor intensive. So I wanted to find software to automate most of the process. I wanted something as easy as Quickbooks but with much more powerful and flexible reporting. All the software for family office services

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was advisor-centric, designed to make the investment advisor or tax advisor look good, rather than client-centric," says Casiano. "None of the products I looked at, no matter how expensive, could help me give my clients real control, so I had to get something made to my specifications. The programmers did such a great job, that once I started to use it, I realized I had to make it available to other family offices. I can now do in hours what used to take several days"

In Casiano's experience, DWIMS, which has been evolving over the past 20+ years,

can benefit any high-net-worth individual or family looking to achieve real control over their assets. Indeed, it has saved her clients, all of whom are enrolled in the system, at least \$53 million combined.

– Sherilyn Casiano Her new software automates Casiano's process for authenticating, verifying and reconciling all information to ensure its accuracy. "I particularly like the automatic reminder feature. It makes sure I never overlook an essential activity, such as updating all the coverage details for excess liability insurance to include the cars or art collection."

Simple to Use. Easy to Customize.

DWIMS is neither difficult nor complicated to use, Casiano says. For those planning on establishing their own family office she offers a consulting service that includes setup, training and ongoing monitoring, with someone always available to address any questions or concerns. "Once you are set up and organized correctly, the system can easily be customized to address even the most complex situations."

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