The governance of a family office — owned by the principal

The structure the ultra-wealthy staff a whole office for — delivered as a system, **for families managing $1M–$50M.**

01 ONE CURRENT PICTURE

“Where does it all stand?” — answered in ninety seconds.

Every entity, position and document on one map, always current. Trust, company, SMSF, personal — the whole, not the fragments.

02 DECISIONS THAT SURVIVE

Judgement your family can inherit.

Every thesis in your words, with its reasoning, its disconfirmers and its review date — on the record, not in your head.

03 NOTHING LAPSES QUIETLY

Deadlines surfaced before they expire — not after they fail.

Deed reviews, nominations, strategy cadences, filings — the compliance calendar watches so the family does not have to.

04 ADVISERS, ALIGNED

Expert hours spent on expertise.

Your professionals arrive prepared, see only what you grant, and their review goes on the record. The fragmentation tax, eliminated.

Measured by one number — the governance score: five dimensions, published methodology, a measure of process discipline — never of portfolio quality.

The overhead was never the product. **Continuity is — wealth that outlives its founder, with the reasoning intact.**

One record, two sides

The same governance record serves both — on the principal's grant, on the adviser's judgement.

THE PRINCIPAL GETS

sovereignty

The whole picture — every entity, position and document on one map — current, in ninety seconds.

The record — decisions with their reasoning and review dates; templates for the documents a well-run office keeps.

The watch — deadlines, cadences and lapsing nominations surfaced before they fail; the score tracking process health.

The grant — advisers see only what the principal allows, scoped to role, logged where only the principal can read it, revocable at any time.

THE ADVISER GETS

a prepared client

The signal — each connected client's governance score before the meeting — who needs attention, without seeing what wasn't granted.

Prepared work — templates arriving with the client's answers in and the open questions marked, plus a brief stating what they are deciding.

The professional record — their review — reviewer, credential, date — captured on the document itself.

Clean terms — participation costs nothing and pays nothing — no referral fees, no commissions, no conflicted remuneration. Alignment stays clean.

The principal stays sovereign. The adviser stays essential. The record keeps them aligned.

“What can Vestry do that ChatGPT can’t?”

At the model level — nothing. Vestry runs on these models. What you are paying for is everything around them.

01

STATE

A chat forgets. Governance must not.

The decision register, document lineage, entity map and compliance calendar persist, connect and version. A brilliant answer that vanishes is not a record.

02

STANDING

A prompt waits. A system acts.

Vestry reminds before deadlines, monitors review cadences and coordinates advisers on a schedule — whether or not anyone thought to ask.

03

THE CONSTRAINT

It never recommends — by architecture.

Prohibited language fails the build. Every document is a labelled template that ends at a professional’s desk. The judgement layer stays human.

The model is the engine. **Vestry is the method, the state, and the constraint.**

Built for the layer — not the layers beneath it

Your specialist systems each hold a fragment. Vestry is not built to replace any of them — it holds the map.

IT IS NOT		IT IS
A transaction or budgeting app no bank feeds, no daily spending, no payments	→	The governance cadence above the transaction cadence — positions, entities and decisions as you record them. State, not flow.
Accounting software no ledgers, no BAS, no payroll	→	The entity layer above it — your operating company sits in the family map as an asset, with its documents, officers and review dates on the record.
A portfolio platform no prices, signals or performance	→	The decision layer above it — every position carries its thesis, its disconfirmers and its review, in your words, on the record.
Legal or advice software it answers no financial question	→	The preparation layer beneath your professionals — labelled templates, your answers only, ending at a solicitor's or accountant's desk.
Practice-management software advisers do not run it; clients grant it	→	The coordination layer between you and them — access scoped to role, logged where only you can read it, revocable at any time.

Every system beneath keeps its job. **Vestry keeps the record of the whole.**