FOTechHub®
FAMILY OFFICE TECH & OPS RESOURCE

4th Annual Family Office Tech & Ops Conference

Wednesday, November 18, 2026 · Networking 11:30 AM · Stage & Sessions 12:00 – 4:00 PM ET · Virtual

DAY 1

FOTechHub.com
All times Eastern (ET)

11:30 – 12:00 PM · NETWORKING

OPTIONAL **Peer Networking**

Attendees are matched one-on-one for short video meetings.
A chance for family office executives to meet peers in the FOTechHub community.

Register Now

12:00 – 12:05 PM · STAGE

STAGE · WELCOME

Welcome from the Host



12:05 – 12:50 PM · STAGE

OPENING PANEL

The SaaS-pocalypse vs. $175 Million: Why Investors Still Back Family Office Tech

Build, Buy or Bet? If AI lets family offices build their own tools, why are investors still writing big checks for specialist software? The backers of K1x, Arch and Luminary make their case: what AI will kill, what survives and who wins as the market consolidates. Then they take the buyer's seat to say how to vet a vendor, when building beats buying and what to rip out of your tech stack today.



12:55 – 1:40 PM · SESSIONS

CASE STUDY

SumIt

Hours Back Every Week | How Temerity Capital Automated Multi-Entity Cash Flow with SumIt's MCP

Temerity Capital Partners CFO Paul Weller and SumIt CEO Alex Lin demonstrate how they replaced Excel-based cash flow forecasting with a live forecast using Claude and SumIt's MCP.



CASE STUDY

Trusted Family

Inside Hoffberger Family Office: Building the Right Tech Stack with Trusted Family

From platform selection to implementation: Harry Halpert, a fifth generation family member, shares how his family office is building its tech stack with Trusted Family.



1:45 – 2:10 PM · SESSIONS

DEMO

ASSET VANTAGE
A UNIDEL Company

Asset Vantage | Integrated Accounting & Reporting

Connecting aggregation, general ledger accounting, performance insights, documents and MCP-enabled AI workflows.



DEMO

ELEVEN SYSTEMS

Eleven Systems | Operations & Consolidated Reporting

See how Eleven brings property, family and financial records into one secure platform, with AI doing the reading and people approving.



2:15 – 2:40 PM · SESSIONS

DEMO

auria

Auria | Unified Platform for Complex Family Wealth

Connect ownership structures, entities, investments, alternative assets, documents, and reporting to reduce tech stack fragmentation.



DEMO

Asseta

Asseta | Accounting & Multi-Entity Mgmt

The Intelligent Family Office Suite® - AI-native operating system bringing GL, partnership accounting, banking, bill pay & reporting in one place.



2:45 – 3:10 PM · SESSIONS

DEMO

Mantle

Mantle Portal | Alts Tech, The OS for Wealth

The private markets tech stack is melting into one platform. Mantle Portal unifies family office data to surface better returns and set your office up for the next gen.



DEMO

Aleta

Aleta | Portfolio Management & Reporting

Consolidate family office holdings into one reporting view, using AI for document processing and an open MCP layer so AI agents can run new workflows on that data.



3:15 – 4:00 PM · STAGE

CLOSING PANEL

You Gave AI the Keys. Who's Watching the Door?

Family offices are moving fast on AI — and the exposure is rarely where they think. Misconfigured settings, DLP gaps that miss a client's balance sheet, agents that can email data out, AI-written code nobody reviewed before it touched a live system. We get into all of it — including what cyber insurers started asking this year that most offices can't yet answer.



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FAMILY OFFICE TECH & OPS RESOURCE

4th Annual Family Office Tech & Ops Conference

Thursday, November 19, 2026 · Networking 11:30 AM · Stage & Sessions 12:00 – 4:00 PM ET · Virtual

DAY 2

FOTechHub.com
All times Eastern (ET)

11:30 – 12:00 PM · NETWORKING

OPTIONAL **Peer Networking**

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12:00 – 12:05 PM · STAGE

STAGE · WELCOME

Welcome from the Host



12:05 – 12:50 PM · STAGE

OPENING PANEL

AI in the Office: From First Prompt to MCP, Custom-Built Tools & Agents

Two single-family offices and a multi-family office have already built AI into their middle and back office, from custom systems to MCP-connected tools — and they're ready to talk about what worked, what they're still solving, and what to weigh before building your own strategy.



12:55 – 1:20 PM · SESSIONS

DEMO

masttro

Masttro | Skip the Spreadsheet. Ask the Data.

See how to go from manual updates in static documents to interactive reports, built in seconds and ready to share with your principal.



DEMO

K1x

K1x | Tax Data Automation

K1Aggregator uses patented AI to extract K-1 data into Excel-ready reports, while its direct APIs with CCH Axcess and GoSystem simplify tax prep.



1:25 – 1:45 PM · SESSIONS

DEMO

Sage

Sage Intacct | Accounting

Practical approaches to GL design, dimensional accounting, and allocations for family offices managing multiple entities and trusts.



DEMO

unlimited.ai

Unlimited ai | Consolidated Reporting & Automation

How a unified, AI-native platform purpose-built for family offices consolidates reporting and automates documents to cut through portfolio complexity.



1:50 – 2:10 PM · SESSIONS

DEMO

AGILLINK AN RBC COMPANY

AgilLink | Accounting & Bill Pay

Cloud-based platform connects bill pay, general ledger accounting, consolidated reporting, and investment data into one system.



DEMO

ARCHWAY

Archway | Integrated Accounting & Reporting

The new AP Module — SmartAP Capture automates invoice intake and entry, and a dynamic workflow engine handles approval rules and payment controls.



2:15 – 2:55 PM · SESSIONS

SESSION

K1x

Beyond K-1 Automation: What's Next for Private Investment Tax Technology?

Following K1x's $175M investment, its CEO, lead investor, and a family office practitioner on how AI is pushing tax tech from data extraction into a true intelligence layer.



SESSION

Owning Your Data & Your Intelligence

A practical discussion and live demo on building your own AI harness and data layer, connecting local and cloud models to your key applications so you own your intelligence.



3:00 – 4:00 PM · STAGE

CLOSING PANEL

Takeaways & Trends to Watch in 2027

A closing discussion on key takeaways from the event and what family offices should have on their radar going forward, involving members of the steering committee and the broader community.

