

How Samara Manages Complex Holdings and Achieves Operational Efficiencies with d1g1t

THE CHALLENGE:

Need for a Wealth Management Platform to Manage the Business, Portfolios & Clients

In 2020, as the founders of Samara were setting up their Multi-Family Office, they knew they needed a modern, flexible platform that would enable them to easily manage their book of business. Also, as a portfolio management firm, it was essential to provide clients with full transparency into their total net worth; therefore, it was critical to have the ability to manage traditional, alternative, and off book investments to deliver a complete view across all holdings.

After evaluating multiple technology solutions, Samara selected the d1g1t institutional-grade wealth management platform for its ability to manage traditional and alternative assets as well as their business, clients and portfolios in one centralized hub. Samara leverages the platform through d1g1t's longtime business partner, Purpose Advisor Solutions, who provide an integrated platform and business support for independent financial advisors to help them launch and run their own wealth management practices with modern technology, operational tools, and investment solutions.

d1g1t's innovative approach and demonstrated commitment to continuous platform improvement gave Samara confidence they were partnering with a forward-thinking team. Also, the platform's on-demand analytics seamlessly integrated across workflows such as reporting, billing, trading, compliance, and client engagement, ensured consistency and efficiency. The platform equips Samara with advanced metrics, household hierarchy views, and custom-tailored analysis for each family. As a Family Office, the platform provides the much needed advanced metrics, and custom-tailored analysis for each family.

About Samara

Samara is a Multi-Family Office based in Westmount, Quebec that serves more than 100+ families. Founded in 2021 by entrepreneurial founders to help families prosper across generations, by leveraging all their family assets. They provide comprehensive wealth management, investment, and legacy planning for high-net-worth individuals and entrepreneurs, offering a personalized, values-based approach with institutional-caliber solutions and services like integrated planning, family continuity, and concierge accounting. Their primary custodians are Fidelity Clearing Canada and National Bank Independent Network (NBIN).



**Michael Grondin,
President & CEO,
Samara**

“Working with Purpose Advisor Solutions gives us the best of both worlds. We get direct access to the d1g1t wealth management platform for centralized portfolio and client management and other complementary solutions like Conquest Planning to accelerate the delivery of hyper-personalized financial plans, as well as the value of having Purposes’ team as an extension of ours. The synergy between the platform capabilities and their expertise has been a force multiplier for our operations.”

THE SOLUTION:

Advanced Analytics and Fully Bilingual Portal Deliver a Differentiated Client Experience

Samara partnered with d1g1t to deliver the sophisticated reporting and analytics their high-net-worth family office clients’ demand. The platform’s native support for both liquid and illiquid asset classes enable Samara to build and monitor complex portfolios seamlessly, while on-demand analytics streamline investment decisions and supervisory oversight. Beyond operational efficiency, d1g1t’s modern client portal and mobile app give high-net-worth families the digital experience they expect, allowing Samara to engage clients with institutional-grade tools that match the sophistication of their wealth.

d1g1t’s advanced analytics were a game changer, offering quality, robustness, and breadth including net worth, projected income, projected liquidity and more. The analytics were essential for Samara’s rigorous approach to risk management and tax-optimized portfolio construction.

The fully bilingual platform enables Samara to deliver French client reports, a branded client portal,

and native mobile applications (iOS/Android) that authentically serve their French-speaking clients. The platform now powers their core client-facing operations, providing comprehensive reporting, ongoing portfolio monitoring, and seamless engagement tools that allow investors direct access their portfolios to track performance, exposure, and risk at the family member level, and share documents bidirectionally through the portal.

Throughout the implementation and beyond, d1g1t’s highly responsive team has demonstrated their openness and flexibility to customizing solutions including specialized tax and accounting packages to meet Samara’s unique needs. This partnership-driven approach delivers ongoing value and the support to maximize the platform’s value.

OUTCOMES:

Comprehensive Real-Time Portfolio Intelligence

Since integrating the d1g1t wealth management platform, Samara has experienced significant operational and client-focused benefits, including:

- **Empowering Advisors with Real-Time Intelligence:** Advisors have complete portfolio information at their fingertips, performance metrics are calculated in real time, consolidated views across all accounts, and the ability to drill into any aspect of a client's holdings on demand. This immediacy creates unmatched flexibility during reviews: when clients ask "what if" questions or want to explore specific scenarios, advisors can respond instantly without scheduling follow-ups or scrambling for data. Everything within the advisor's purview such as performance attribution, risk exposures, income projections, tax implications is visible and actionable on a single screen. The result is more productive meetings, deeper client trust, and advisors who spend less time gathering information and more time delivering value.
- **Enhanced Client Experience:** The d1g1t platform provides clients with a higher level of transparency and flexibility to their investments including alternatives and off book assets through an intuitive bilingual mobile app and client portal. Samara advisors can now offer clients a seamless, transparent view of their portfolios, with easy access to investment summaries and updates. The client experience benefits from the platform's modern interface, which is popular among both advisors and investors.
- **Streamlined Operations:** d1g1t has helped Samara simplify client monitoring, reporting, and client engagement activities all from a single platform. The ability to track and report on key business metrics from a centralized dashboard saves time and improves accuracy. Operationally, the platform delivers transformative efficiencies: accountants can now download multiple documents simultaneously, saving valuable time, while the

ability to manage private placements directly within the platform eliminates the error-prone, time-consuming practice of tracking these investments in spreadsheets. With the powerful institutional-grade analytics and risk engine, the real-time daily performance computing, and the platform's flexibility, Samara can produce reports at speed, reducing the time spent on manual workflows and resulting in a differentiated client experience.

"Managing a multi-family office means juggling complex relationships and portfolios across multiple generations and family structures. With d1g1t we have complete visibility across our business and can easily manage clients and portfolios in one place. The corporate dashboard has become mission-critical for us. I can view our entire book of business and see real-time performance across all families, understand how we're protecting wealth during market volatility while capturing upside opportunities, and break down gains between income generation and market appreciation. This level of operational intelligence has elevated how we run the business. We're identifying trends faster, having more strategic conversations with families, and making smarter resource allocation decisions. d1g1t enables us to truly have our finger on the pulse of the entire firm."



Patrick Potvin,
Head of Operations,
Samara

The results have been transformative for client satisfaction. With the advanced analytics and integrated workflows Samara can be highly responsive to client needs while maintaining the high level of personal engagement their clients expect. d1g1t is

helping to streamline daily operations and provide comprehensive portfolio visibility that extends beyond traditional holdings to include alternative and off-book assets, critical for today's sophisticated investors.

IN SUMMARY:

For five years, Samara has been using the d1g1t platform to help deliver an exceptional wealth management experience to their high-net-worth and ultra-high-net-worth clients. The platform serves as a central hub, unifying client management, portfolio oversight, and business operations in a single, integrated system.

Samara is in the process of expanding their use of d1g1t to include trading functionality, a natural evolution given how seamlessly the trading module

integrates with existing workflows. The ease of use and integration will allow the firm to continuously enhance their service delivery without disrupting operations.

With d1g1t, Samara has elevated both operational efficiency and the digital client experience, positioning themselves to meet the complex demands of their high-net-worth clientele.



To learn more about the d1g1t enterprise wealth management platform visit

www.d1g1t.com