MSCI Total Plan Manager for Family Offices

Seamless reporting and deep portfolio insights for better investment decisions.

Why Choose Total Plan Manager?

Total Plan Manager is designed to meet the specific needs of family offices managing multi-asset class portfolios, including private investments.

Total Plan Manager provides detailed reporting and portfolio analytics, investment data management and advanced risk, forecasting and stress-testing functionalities, all within an integrated platform.

Key Benefits for Family Offices

- Consolidated view of your portfolios' public and private assets.
- Tailored reports for individual stakeholders, such as family members or investment committees.
- Aggregate data from multiple custodians, fund managers, administrators, and other sources.
- Analyze performance across total and sub-portfolios, including private equity, venture capital, and real estate.

Total Plan Manager is built for family offices managing multi-asset portfolios, including private investments.

Features & Capabilities

Performance & Liquidity Analytics

- **Multi-Asset Class Performance:** Measure returns across public and private investments.
- **Liquidity Analysis:** Evaluate portfolio liquidity for wealth transfers and timely fund access.
- **Forecasting:** Run multi scenario analysis and market tools for long-term wealth planning.

Risk Management & Exposure Analysis

- **Custom Exposure Monitoring:** Track exposure across asset classes and regions.
- **Stress Testing:** Test portfolio resilience.
- **Benchmarking:** Compare performance against industry benchmarks.

Manager Due Diligence

- **Performance Monitoring:** Real-time alerts on manager strategy adherence.
- **Attribution Analysis:** Identify performance drivers in public and private investments.
- **Benchmark Comparison:** Assess manager performance against 10,000+ customizable benchmarks.

MSCI | CLARITY DRIVES ACTION

Discover MSCI's solutions for family offices. ***Talk to an expert today!***

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Disclaimer