

Creating Lasting Legacies

A Handbook for Enduring Families

Powered by



ASSET VANTAGE®



Foreword

My Family Office Journey

How It All Began

My journey into family archiving began, quite simply, with an obsession to organize things. I've always believed that clarity and order are essential, especially when it comes to managing complexity.

After years of refining and streamlining our family office operations, I had successfully built a system where every financial and operational detail was under control. That process not only brought efficiency and peace of mind, it also led to the creation of Asset Vantage, a platform born out of our need to bring structure to global family office finances.

But once the numbers were in order, my attention shifted to something less tangible but equally important: our family's non-financial assets - the stories, documents, heirlooms, photographs, and memorabilia that make up our collective memory. These priceless items were scattered everywhere: in basements and drawers, forgotten in old trunks, or simply stashed away in our homes and offices. Some were in the custody of family members, others were left uncared for, and many were at risk of being lost altogether.

Frankly, I didn't know where to start. So, I did what I knew best, I brought in professional help. We hired an archivist who I found on LinkedIn! whom I found on LinkedIn. Her mandate was simple: help us make sense of the mess. But her real challenge turned out to be far more complex, earning the trust of family members. These weren't just objects or papers to them; they were deeply personal, sometimes emotional, and often intertwined with identity and memory.

It took time. Slowly but surely, relationships formed, stories surfaced, and patterns emerged. What began as an effort to organize became something much more profound: a journey of discovery, connection, and continuity.

That journey became the seed of this handbook*. This is the guide I wish I had when we started. We made plenty of mistakes along the way, and we learned even more. If you're beginning your own legacy project, I hope this serves as both a roadmap and a source of inspiration. Because once you begin, and you begin with intention, the rest, as they say, is history.

That journey became the seed of this handbook. This is the guide I wish I had when we started. We made plenty of mistakes along the way, and we learned even more. If you're beginning your own legacy project, I hope this serves as both a roadmap and a source of inspiration. Because once you begin, and you begin with intention, the rest, as they say, is history.

Sunil K Dalal, Principal, RM Capital

**All exhibits are sample images for illustration purposes only.*



Preserve the Past, Empower the Future

At Asset Vantage, we believe the real “assets” of a family aren’t just financial investments – they are the family members themselves, especially the next generation. While wealth preservation and financial optimization are crucial, nurturing and safeguarding a family’s legacy is equally essential.

Beyond Financial Capital: The True Wealth of Families

Today’s family principals dedicate significant time to growing wealth, managing investments, and ensuring successful academic and professional paths for their next gens. But without structured knowledge-sharing, storytelling, and documentation of legacy, the values, lessons, and rich histories of families are at risk of being forgotten.

Introducing Lasting Legacies by Asset Vantage

As the world’s leading general ledger and investment reporting platform for family offices, Asset Vantage now offers a new dimension of legacy preservation. We help families capture and preserve their true wealth – the stories, memories, artifacts, and values that define who they are.



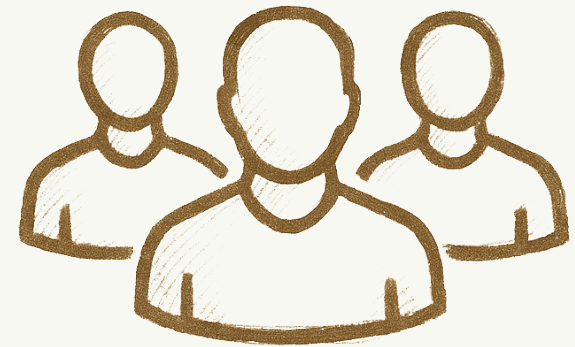
A Step-by-Step Guide to Creating Your Family Archive





Step 1

Create a Team





The first and most crucial step in building a successful family archive is assembling the right team. This group will guide the vision, execution, and sustainability of the archive project. Ideally, your team should include a mix of family members and professionals with complementary skills and shared enthusiasm for preserving family history.

Who Should Be on the Team?

- **Family Champion:** A committed family member who deeply values legacy and can act as the project lead or “chief memory officer.”
- **Archivist or Historian (Optional but Valuable):** A professional or external firm who understands how to catalog, preserve, and digitize historical materials properly.
- **Tech-Savvy Organizer:** Someone familiar with digital tools, cloud storage, and metadata tagging.
- **Storyteller or Writer:** A person or external firm who can bring life to the archive by writing narratives, captions, and context for materials.
- **Next-Gen Family Member:** Involving the next generation ensures continuity and helps build long-term engagement.

What Are Their Responsibilities?

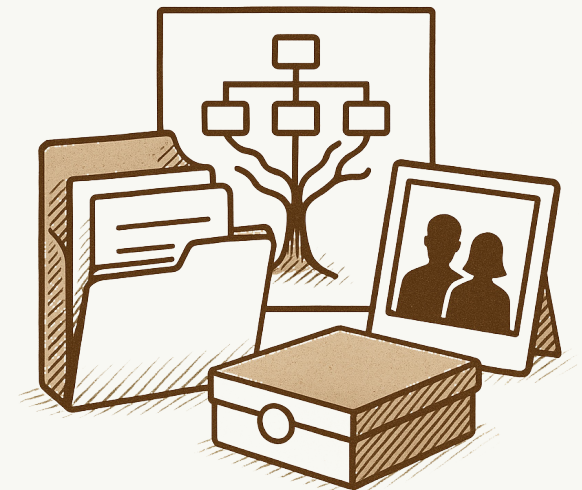
- Define the scope and goals of the archive
- Establish timelines and assign tasks
- Identify, collect, and organize materials (documents, photos, recordings, heirlooms, etc.)
- Select tools or platforms (e.g. digital archiving software, shared drives, cloud backup)
- Communicate progress and keep the wider family engaged

Starting with a strong, clear-headed team ensures that the project is purposeful, collaborative, and built to last. Even a small group, if passionate and organized, can make a meaningful impact.



Step 2

Identify Important Materials and Build Your Archive Foundation





Family Tree

Begin by building a comprehensive family tree. Include both immediate and extended relatives, with key details such as:

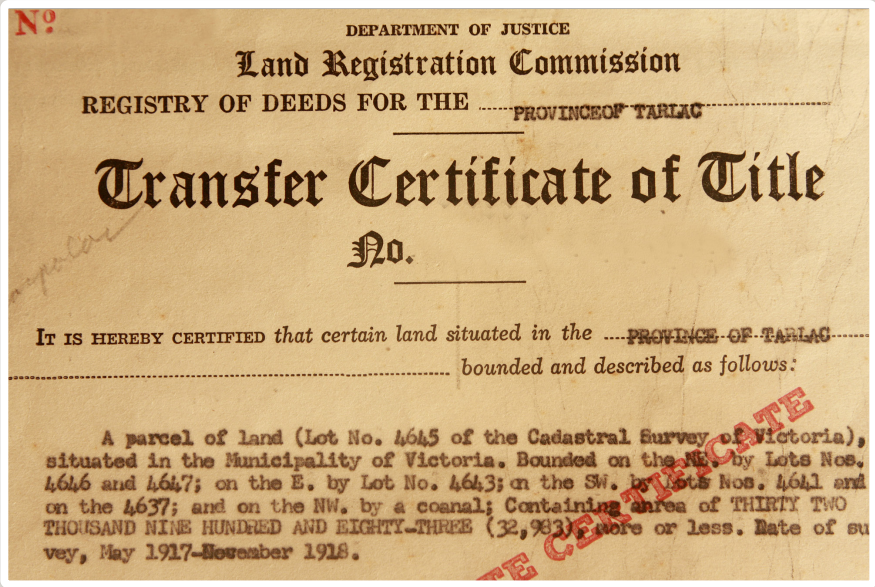
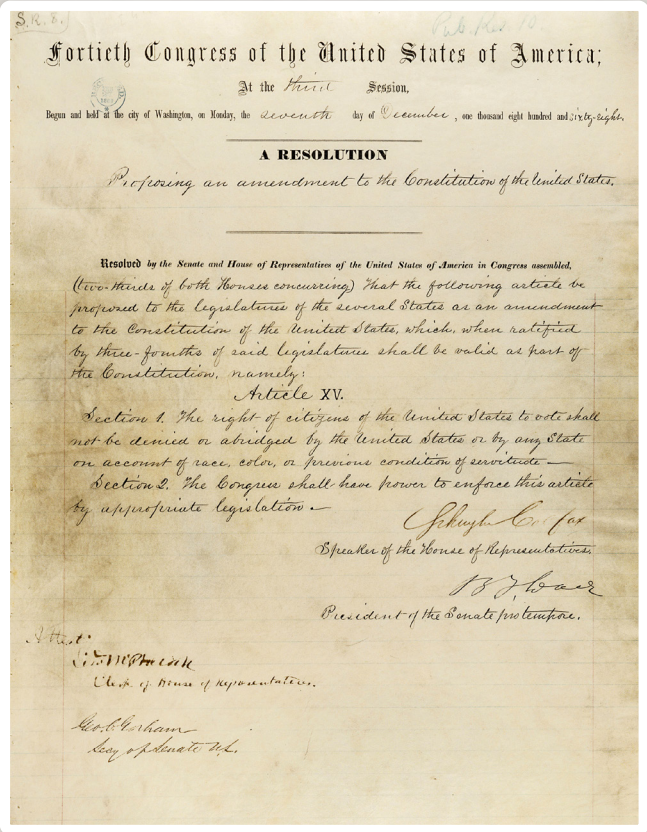
- Full name
- Date and place of birth (and death, if applicable)
- Their relationship to you or their role in the family or company
- Notable life or career events
- Personal stories, traits, and anecdotes

For corporate archives of family-owned enterprises, identify long-serving current and former employees, partners and investors. Then, document their roles, contributions, and connections to landmark company events. Then, examine your family homes and offices for physical and digital materials that help narrate your story. Categorize them as follows:

- **Paper Records:** Important legal and business documents, personal letters, media clippings, awards and certificates, academic records, diaries, journals, letters, recipe books, annotated novels.
- **Photographs:** Family albums, old portraits, printed and digital images of homes, factories, offices.
- **Special & Digital Media:** Audio cassettes, VHS tapes, CDs, LPs, DVDs, Blu-rays, voice notes, digital videos, scanned documents, email messages.
- **Memorabilia:** Furniture, clothing, writing instruments, personal items, utensils.
- **Corporate Timelines:** Product, services, notes, designs, trademarks, copyrights, patents, key events and milestones.
- **Collectibles:** Art, artifacts, jewelry, sculptures, stamps, coins, matchbox labels, vintage toys.

Collect, categorize, group and store these materials systematically, considering both sentimental and historical value.

Exhibit A



Paper Records

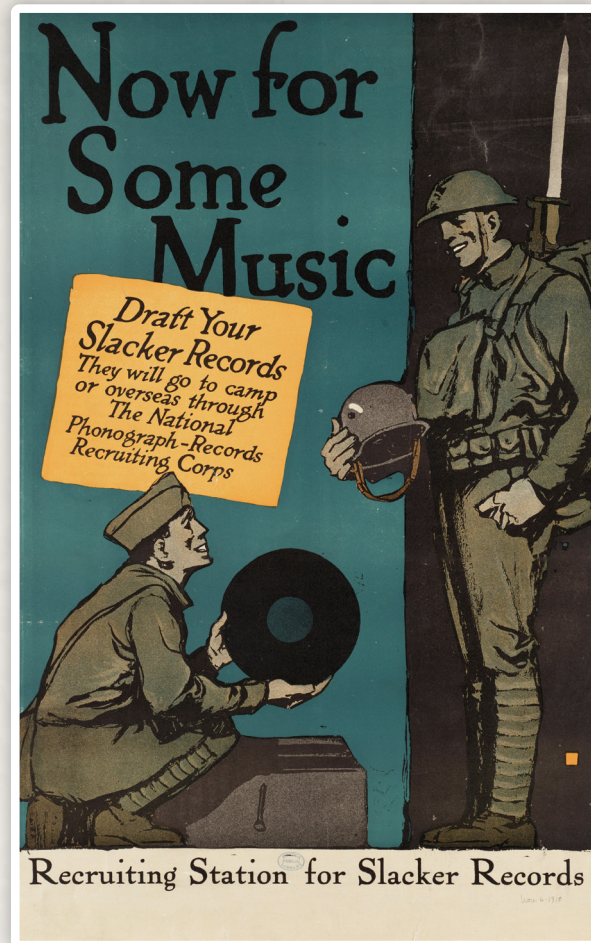


Photographs





a.



Special Media

b.



Image Source: a. Photo by Boston Public Library on Unsplash; b. Photo by LSE Library on Unsplash

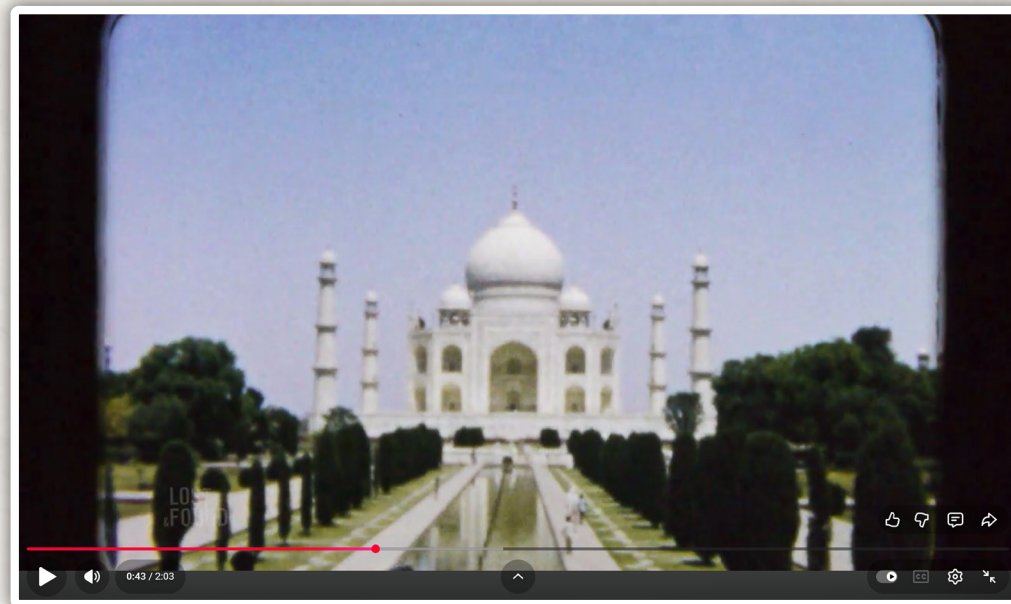
Note: Image used for visual representation only.



a.



b.



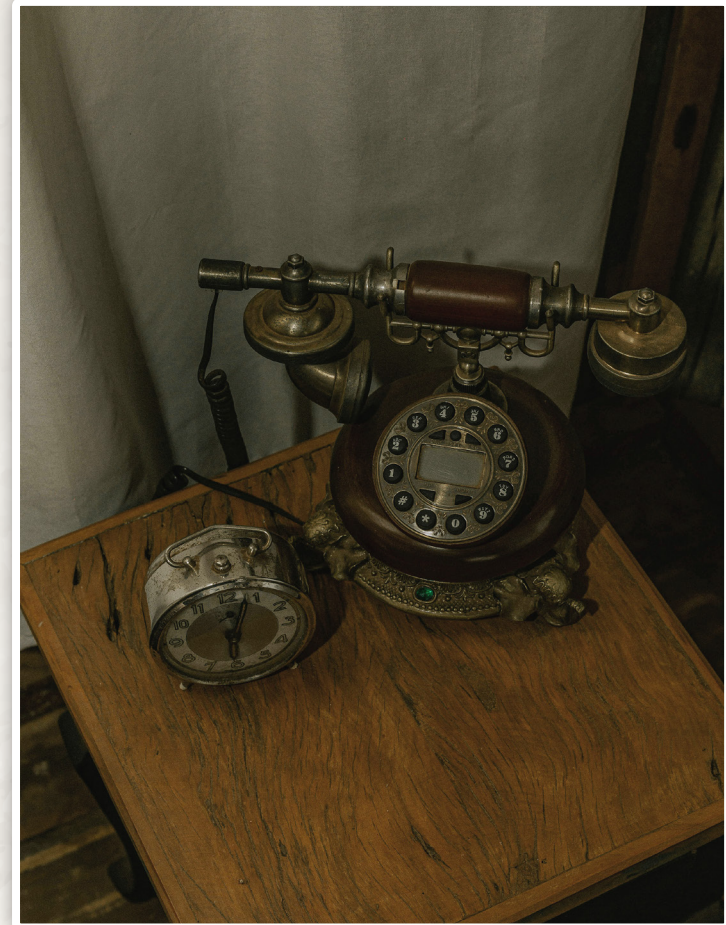
Digital Media



a.



b.



Memorabilia



a.



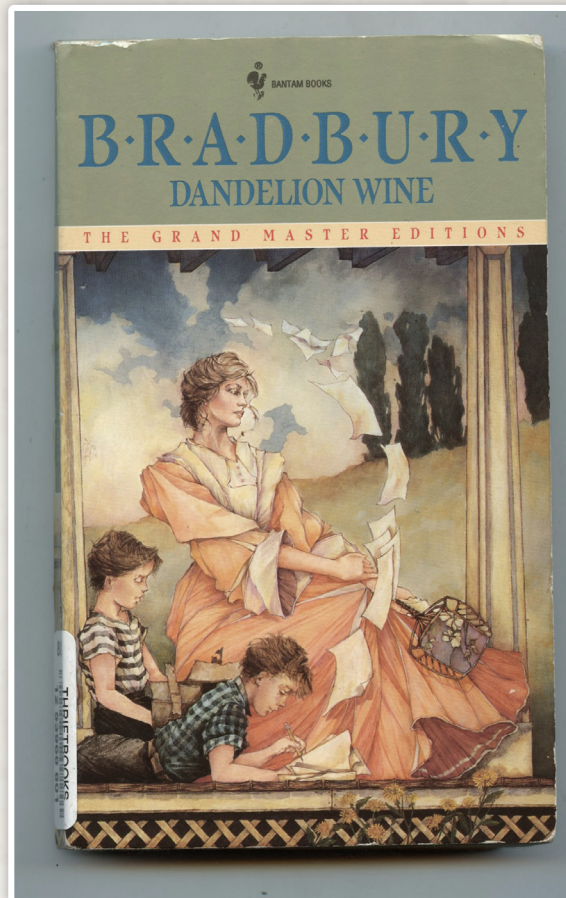
b.



Artworks



a.



b.



Books & Diaries



a.



b.



c.



Collectibles



Step 3

Restore, Preserve, Store





Once you've gathered your materials, it's time to protect and future-proof them. This step ensures that your family's memories – both physical and digital – are safeguarded for generations to come. You can use the services of specialists to help you preserve your archive.

Restore

- **Old Items:** Photographs, documents, tapes, or heirlooms may be damaged, faded, or fragile. Restoring these items helps bring them back to life and prevents further deterioration.
- **Photos & Documents:** Consider professional photo restoration services or software tools to enhance faded images. Handle fragile papers with care – use gloves and avoid direct contact.
- **Audio/Video:** Digitize old VHS tapes, cassettes, or film reels using professional conversion services. Remove noise or enhance sound quality where needed.
- **Heirlooms:** Repair or clean artifacts only under expert supervision to avoid accidental damage.

Preserve

- **Digitization:** Scan all photos, documents, and records at high resolution. Back up all digital files in multiple locations (local drives, cloud storage, external hard drives).
- **Metadata:** Tag each digital item with key information such as date, people, place, and context to make them searchable and meaningful.
- **Physical Preservation:** Use acid-free boxes, archival sleeves, and temperature/humidity-controlled storage for originals. Avoid storing items in damp, hot, or sunlit areas.

Store

- **Digital Archives:** Use cloud-based platforms like Google Drive, Dropbox, or specialized family archiving tools like Asset Vantage. Set up structured folders with clear naming conventions.
- **Physical Archives:** Create a designated space in your home, a family office, or a secure storage unit. Label everything clearly and log it into an inventory.
- **Access & Sharing:** Give trusted family members access to the digital archive. Consider creating a shared family portal or drive for ongoing contributions.



Step 4

Conduct Oral History Interviews





These interviews are a vital part of creating a compelling, story-driven archive. Speak with:

- Elder family members
- Long-time family friends or associates
- Former or current employees, partners, investors (for corporate archives)

Encourage them to share personal stories, describe their upbringing, relationships, traditions, and the significance of objects they have kept. Tailor your questions according to the individual's role or department.

Best Practices

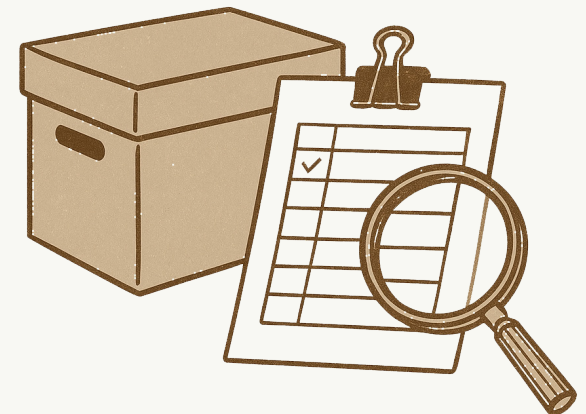
- Prepare a list of open-ended questions
- Conduct interviews in a quiet, comfortable setting
- Use reliable recording tools
- Respect differing perspectives without interrupting or correcting

Document their consent through a formal No Objection Certificate if interviews or shared materials are to be published or exhibited.



Step 5

Cataloging the Archival Collection





Create a Master Inventory

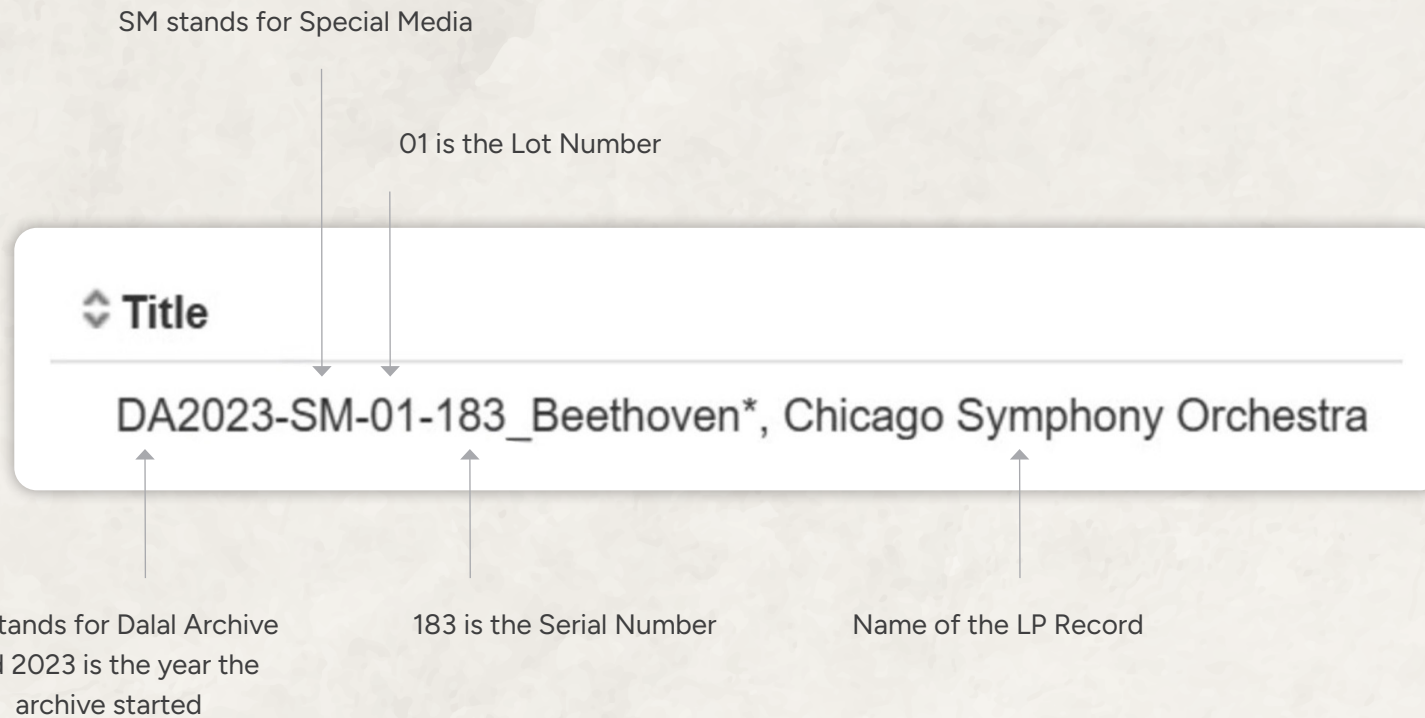
Use Excel or archival software like Asset Vantage to record:

- Accession Number (e.g., DA2023-PH-01-01)
- Material Type (photograph, letter, sculpture, etc.)
- Record Type (letter, ID card, video, artwork)
- Nature of Record (personal or corporate)
- Period and Decade
- Provenance and Ownership Details
- Description and Key Individuals Involved
- Extent (pages, duration, parts)
- Language, Dimensions, and Condition
- Location and Sub-location (room, shelf)

Each Material Type Must Have Additional Specific Fields

- **Artworks:** Artist name, medium, title, year, purchase details, image.
- **Special Media (LPs, Cassettes, CDs):** Album name, record company, catalog number, release year, speed (RPM), genre/style, dimensions, condition, provenance.
- **Memorabilia:** Title, object type, brand, related documents, technical specs, dimensions, extent, location, owner.
- **Collectibles (Stamps/Coins):** Series title, brief description, issue year, keywords, materials, collector name.
- **Digital Media:** File title, file type, event/occasion, audio/video quality, cross-references, personalities featured, file path.

Exhibit B



Photographs



PR stands for Paper Records

01 is the Lot Number

📄 Title

DA2023-PR-01-07_Native Stock Broker Association

DA stands for Dalal Archive
and 2023 is the year the
archive started

07 is the Serial Number

This is the Name/Title of
the Paper Record

Paper Records



Step 6

Digital Archiving Using Asset Vantage





Private Assets

Capture archival collection as part of the Private Assets module. This ensures that every legacy object is acknowledged in your family's consolidated wealth view.

- Record purchase, valuation, or transfer transactions for heirlooms, artworks, or collections.
- If invoices or bank details are missing, post entries to capital accounts to maintain balance sheet integrity.
- Classify items under Asset Class (Private Collection) and Strategy (e.g., Artworks, Photographs, Memorabilia).

Position Tags

Create powerful tagging structures to group and categorize the archival collection.

- Use Custom Position Tags (e.g. Artworks, Photographs, Memorabilia, Events).
- Rename and reorder tags to match how your family prefers to view reports.
- Tagged items appear consistently across the Position Master, analytics, and exports.
- Helps build meaningful insights and comparisons across generations and asset types.

Document Vault

Securely store and manage all archival documents in one place.

- Upload, preview, and attach files (letters, wills, certificates, images) to entities or groups.
- Title documents thoughtfully for easy search and retrieval.
- Define user permissions for Add, Delete, View, and Export to maintain privacy and control.
- Bank-grade security ensures sensitive legacy documents remain private, while still accessible to trusted members.

Exhibit C



Use **Private Assets Module** to Record Transactions.

VK

Bank, Credit Card & Cash

Mutual Funds

Direct Equity

Fixed Income

Managed Accounts

Unitized Funds

Private Equity Funds

Real Estate

Private Assets

Insurance

Journal Entry

Corporate Actions

Loan Book

Derivatives

Partnership

Transaction Sync

Consolidated Transactions

File Converter

Private Assets Transaction - Edit

Entity *

Sunil Kishore Dalal (SKD)
Individual

Type *

Purchase

Account - For *

Number-Short Code-Currency-Type

Photographs-01-Archive - Cus...
08 - PH - INR - Custodian

Payee / Payor / Bank

30100 - Capital Account - Cus...
30100 - LA - INR - Ledger

Transaction Date *

01-Aug-2024

Title *

DA2023-PH-01-28_Sarit Kunj in Ahmed...

Amount *

100

Certified By

0

Notes

this is a photograph of Sarit Kunj in Ahmedabad, This house was designed

Documents

SaritKunjAhmedabad.d
ocx

DA2023-PH-01-28-
01.jpg

DA2023-PH-01-28-
02.jpg

Tags

Sarit Kunj

Maniklal Jethabhai

French

architect

Architecture and Design

Architecture and Design

Add a new transaction as follows:

- Select the respective entity under the 'Entity' field.
- Select transaction 'Type' as 'Purchase/Transfer-in.'



- Create a custom 'Custodian Account' based on the archival material to enter and store the data under that account in general ledger.

Private Assets Transaction - Edit

Entity * Sunil Kishore Dalal (SKD) Individual

Type * Purchase

Account - For * Photographs-01-Archive - Cus...
Number-Short Code-Currency-Type 08 - PH - INR - Custodian +

Payee / Payor / Bank 30100 - Capital Account - Cus...
30100 - LA - INR - Ledger +

Transaction Date * 01-Aug-2024

Title * DA2023-PH-01-28_Sarit Kunj in Ahmedabad +

Notes this is a photograph of Sarit Kunj in Ahmedabad, This house was designed

Documents SaritKunjAhmedabad.d ocrx DA2023-PH-01-28-01.jpg DA2023-PH-01-28-02.jpg +

Tags Sarit Kunj Maniklal Jethabhai French architect Architecture and Design Architecture and Design

Private Assets Transaction - Edit

Entity * Sunil Kishore Dalal (SKD) Individual

Type * Purchase

Account - For * Photographs-01-Archive - Cus...
Number-Short Code-Currency-Type 08 - PH - INR - Custodian +

Payee / Payor / Bank 30100 - Capital Account - Cus...
30100 - LA - INR - Ledger +

Transaction Date * 01-Aug-2024

Title * DA2023-PH-01-28_Sarit Kunj in Ahmedabad +

Notes this is a photograph of Sarit Kunj in Ahmedabad, This house was designed

Documents SaritKunjAhmedabad.d ocrx DA2023-PH-01-28-01.jpg DA2023-PH-01-28-02.jpg +

Tags Sarit Kunj Maniklal Jethabhai French architect Architecture and Design Architecture and Design

- You can add these details by clicking on the '+' sign right next to 'Account-For.'



- When you click on the '+' sign the page below will appear where you can add all the details like 'Account - For, Payee/Payor/Bank, Short Code, Account Name, Account Number.'
- Once you add the above details the 'Display Name' will appear on its own.

Account Add/Edit

Class : Account Type * Asset : Custodian

Entity / First holder Name * Sunil Kishore Dalal (S... Individual)

Account Name *

Account Number *

Currency * INR

For *

Short Code *

Display Name * - INR - Custodian

Default Lot Relief * First In First Out

Capitalize Expenses ☒ ☐

Business Account ☐

Speculative Account ☐

Default Transaction Status C : Cleared

Opening Balance 0 DR

Set #

Default Payee / Payor / Bank Account Select

Linked For Capital Flow

2nd Holder

3rd Holder

Nominee

Tax Code / Schedule

Credit Limit

Payment Date Select

Sync Accounts Select

Address Select

Private Assets Transaction - Edit

Entity * Sunil Kishore Dalal (SKD) Individual

Type * Purchase

Account - For * Photographs-01-Archive - Cus... 08 - PH - INR - Custodian

Payee / Payor / Bank 30100 - Capital Account - Cus... 30100 - LA - INR - Ledger

Transaction Date * 01-Aug-2024

Title * DA2023-PH-01-28_Sarit Kunj in Ahmedabad

Notes this is a photograph of Sarit Kunj in Ahmedabad, This house was designed

Documents SaritKunjAhmedabad.d ocx DA2023-PH-01-28-01.jpg DA2023-PH-01-28-02.jpg

Tags Sarit Kunj Maniklal Jethabhai French architect Architecture and Design Architecture and Design

- The second side accounting impact will either go the respective bank account from where the funds are deducted or capital account if it is a vintage item where the details like purchase amount, date etc. are not known.



- Create an appropriate 'Title' which will be displayed on the UI (frontend). Assign account numbers and short codes (e.g. PH for Photographs) to the title.

Private Assets Transaction - Edit

Entity * Sunil Kishore Dalal (SKD) Individual

Type * Purchase

Account - For * Photographs-01-Archive - Custodian
Number-Short Code-Currency-Type 08 - PH - INR - Custodian

Payee / Payor / Bank 30100 - Capital Account - Custodian
30100 - LA - INR - Ledger

Transaction Date * 01-Aug-2024

Title * DA2023-PH-01-28_Sarit Kunj in Ahmedabad

Notes this is a photograph of Sarit Kunj in Ahmedabad, This house was designed by Sarit Kunj.

Documents SaritKunjAhmedabad.d ocx
DA2023-PH-01-28-01.jpg
DA2023-PH-01-28-02.jpg

Tags Sarit Kunj, Maniklal Jethabhai, French, architect, Architecture and Design, Architecture and Design

Private Assets Transaction - Edit

Entity * Sunil Kishore Dalal (SKD) Individual

Type * Purchase

Account - For * Photographs-01-Archive - Custodian
Number-Short Code-Currency-Type 08 - PH - INR - Custodian

Payee / Payor / Bank 30100 - Capital Account - Custodian
30100 - LA - INR - Ledger

Transaction Date * 01-Aug-2024

Title * DA2023-PH-01-28_Sarit Kunj in Ahmedabad

Amount * 100

Certified By 0

Notes this is a photograph of Sarit Kunj in Ahmedabad, This house was designed by Sarit Kunj.

Documents SaritKunjAhmedabad.d ocx
DA2023-PH-01-28-01.jpg
DA2023-PH-01-28-02.jpg

Tags Sarit Kunj, Maniklal Jethabhai, French, architect, Architecture and Design, Architecture and Design

- Enter the appropriate 'Amount.' If details are known then use actual details otherwise use nominal value (e.g. US\$100) if original price is unknown.



- Add 'Notes' and 'Documents' (images, word, PDF etc.) which will get saved to respective transactions as evident.

Private Assets Transaction - Edit

Entity* Sunil Kishore Dalal (SKD)
Individual

Type* Purchase

Account - For* Photographs-01-Archive - Cus...
Number-Short Code-Currency-Type 08 - PH - INR - Custodian

Payee / Payor / Bank 30100 - Capital Account - Cus...
30100 - LA - INR - Ledger

Transaction Date* 01-Aug-2024

Title* DA2023-PH-01-28_Sarit Kunj in Ahmedabad

Notes
this is a photograph of Sarit Kunj in Ahmedabad, This house was designed

Documents
SaritKunjAhmedabad.d ocx
DA2023-PH-01-28-01.jpg
DA2023-PH-01-28-02.jpg

Tags
x Sarit Kunj
x Maniklal Jethabhai
x French x architect
x Architecture and Design
x Architecture and Design

Private Assets Transaction - Edit

Entity* Sunil Kishore Dalal (SKD)
Individual

Type* Purchase

Account - For* Photographs-01-Archive - Cus...
Number-Short Code-Currency-Type 08 - PH - INR - Custodian

Payee / Payor / Bank 30100 - Capital Account - Cus...
30100 - LA - INR - Ledger

Transaction Date* 01-Aug-2024

Title* DA2023-PH-01-28_Sarit Kunj in Ahmedabad

Notes
this is a photograph of Sarit Kunj in Ahmedabad, This house was designed

Documents
SaritKunjAhmedabad.d ocx
DA2023-PH-01-28-01.jpg
DA2023-PH-01-28-02.jpg

Tags
x Sarit Kunj
x Maniklal Jethabhai
x French x architect
x Architecture and Design
x Architecture and Design

- Add 'Tags' with words that will help you identify the material.



- Once the transaction is recorded, it can be tagged under appropriate 'Asset Class' and 'Strategy' based on how the user wants to view the data. For this 'Position Tagging' can be used in AV.
- Tag Private Collection under 'Asset Class' and the 'Material Type' (Artworks, Photographs, Memorabilia, etc.) under 'Strategy.'

Total Quantity 1
Rate 1,000.00
Total Value 1,000.00

TransactionsPositionDocumentsLedgerNotes

Pre-set Strategy*Private Assets

Category*Private Assets

Exchange*AVEX

Asset Class*Private Collections

Sector*No Sector

Reconciliation*Select

RMC Group*Select

Position Tag 6*Select

Benchmark*None

Risk Currency*INR

Advisor*No Advisor

Strategy*Art

Market Capitalization*Select

Archive Themes*Select

Family Group*Select

Position Tag 7*Select



Step 7

Conduct Further Research





Add Depth and Accuracy to Your Archive

Once your initial collection of family materials is in place, the next step is to enrich it through thoughtful and targeted research. This ensures the archive isn't just personal, but also historically and culturally grounded.

Ways to Deepen Your Research

- **Online Archives and Databases:** Use platforms like JSTOR, Google Scholar, Ancestry.com, or national and local digital archives to validate facts and uncover missing pieces.
- **Specialist Websites:** Look into niche sources depending on your family's background, military records, immigration documents, land registries, or community forums.
- **Libraries and Public Institutions:** Visit local or national libraries, historical societies, or university archives for rare books, periodicals, maps, and genealogical records.
- **Newspaper and Magazine Archives:** Explore events and timelines surrounding your family's life through old press clippings, obituaries, classifieds, or features.
- **Academic and Published Works:** Read regional histories, biographies, or academic articles that may reference your family or provide essential context.

This research not only enriches your archive but also brings clarity and credibility. It helps validate oral histories, situates personal narratives within larger historical moments, and often uncovers fascinating and unexpected stories.



Step 8

Create Engaging Experiences



Bring Your Family or Corporate History to Life



An archive is only as valuable as its ability to connect generations. Turning your material into curated experiences helps preserve interest, deepen emotional connection, and foster pride in heritage, especially among younger family members.

Ideas to Activate Your Archive

- **Family Storybooks or Photo Journals:** Curate key moments, photographs, and anecdotes into a beautifully designed book that can be gifted or passed down.
- **Private Family Websites or Multimedia Galleries:** Digitize and centralize content for easy access and collaborative storytelling.
- **Short Films or Family Documentaries:** Capture interviews with elders, family rituals, and legacy stories. Use old photos and videos for compelling retrospectives.
- **Interactive Family Heritage Days:** Host events where different generations engage with memorabilia, share stories, and celebrate legacy through food, music, and culture.
- **Gamified Learning for Next-Gen:** Create family trivia games, treasure hunts, or digital storytelling challenges to help younger members learn while playing.
- **Legacy Workshops:** Hold periodic sessions to educate the next generation on values, philanthropy, and family history in a fun, engaging way.

These initiatives shift the archive from passive storage to active storytelling helping your family's legacy evolve into a living, breathing tradition.

Why Choose Lasting Legacies with Asset Vantage?

Your family's story deserves more than a drawer full of photos or scattered memories – it deserves a living archive, thoughtfully preserved and meaningfully shared. Asset Vantage makes this possible.

- **Seamless Integration:** Bring your legacy and wealth together. Archive family history, heirlooms, and milestones right alongside your financial data – organized, accessible, and future-proof.
- **Private & Secure:** Your family's memories remain just that, yours. With bank-grade security and customized access, only trusted members can view and contribute.
- **Engaging for Generations:** From multimedia timelines to digital exhibitions and family storytelling portals, AV helps you turn history into an experience that educates, inspires, and connects generations.



Preserve the Stories That Define You.
Build a Future That Remembers You.





Every Family Has a Legacy.
The Question Is – Will Yours Be
Preserved, Understood, and Passed On?



Start Your Lasting Legacy with
Asset Vantage Today.



www.assetvantage.com