



Where Tech Meets Vision: How Vincimus' Multi-Family Office Realized Peak Success with Summit

Vincimus achieved streamlined alts reporting and elevated client experience thanks to Summit's powerful technology

In 2022, Vincimus Capital — a multifamily office managing generational wealth primarily through unique and exclusive alternative investments — opened its doors with a single mission and impassioned rally cry: Fortitudine Vincimus.

This famed quote — which translates to Through Endurance We Conquer — is inscribed on the headstone of Earnest Shackleton, the pioneering polar explorer who was among the first to conquer expeditions across Antarctica and lauded for his remarkable perseverance and survival.

With the same spirit of resolve and a commitment to pioneering a new, better path from which they could serve their clients, the quote spoke to founder Lockwood Holmes in a deep and personal way.

His next adventure: to build a new firm, Vincimus Capital, delivering unparalleled client experiences. This was and is the proverbial peak he is ascended toward.

To get to the top, the firm sought first to build the right foundation: a scalable and custom technology infrastructure capable of powering complex wealth planning and investment management needs, while supporting simplified and easy communication of complex information.

Vincimus knew they needed something that would take their experiences to new heights. What they needed was a partner-provider who could match and complement their ambition to conquer new territory.

Enter Summit:

A different kind of wealthtech platform for modern RIAs.

Together, they were able to create a tailored solution that revolutionized Vincimus' data management, traditional and alts reporting, and how they communicated and collaborated with clients.

Together, they journeyed toward success. Here's how.



The Challenge:

Finding the right tech. Leading the right transition.

Selecting the right tech partners was priority number one for Holmes and the team.

Prior to launching Vincimus and going independent, he and the advisors at their firm faced challenges in managing alternative investments, which are a central piece of the firm’s investment philosophy and a key differentiator in the ultra-high-net-worth market.

Alternative investments, like private equity and VC funds, are unique in a way that often makes reporting on them complex. Unlike traditional investments, many alts don’t flow through standard custodian feeds and they operate differently than public investments, often requiring time-consuming and clunky offline tracking and accounting. Specifically, although they couldn’t necessarily change the structural state of alts data by investment sponsors, they wanted a platform that would streamline their reporting process and enhance the overall experience for their clients.

Because the alternative investment story can be complex, Vincimus prioritized a system designed to not only manage and report on investments, but also to paint a picture of each client’s wealth more vividly and visually.

“We were looking for something that could really tell a story in a succinct way, and convey something complex in a very simple and elegant manner,” said Vincimus Capital COO Morgan Phillips.

Furthermore, functionality was only one factor in solving the “right tech” equation.

Working with ultra-high-net-worth investors, ensuring a smooth and precise transition through exceptional support was the other, and equally as important, factor.

The team understood how important it would be to seamlessly onboard clients to a new platform for its successful adoption. Still, an even more critical lift would be in transferring historical data captured in legacy systems — a colossal task demanding accuracy and synchronization, particularly when dealing with a decade’s worth of month-by-month investment, performance and planning data.



The Solution:

A platform to conquer. A partner to collaborate.

As a progressive, personal, and performance-minded firm, Vincimus needed a technology partner that delivered that same inspirational energy and industry experience.

That's exactly what Summit offered.

More pointedly, the two companies immediately shared a palpable synergy fueled by entrepreneurial spirit and hunger for innovation. It was apparent from the beginning that this would be a partnership that would ignite a collaborative spark.

The Vincimus team envisioned a future where they could reduce reliance on spreadsheets and other manual methods, where complexity would give way to simplicity, where data would tell more meaningful stories, and where clients would feel empowered and understood. And they needed to arrive at that future in a precise and efficient manner.

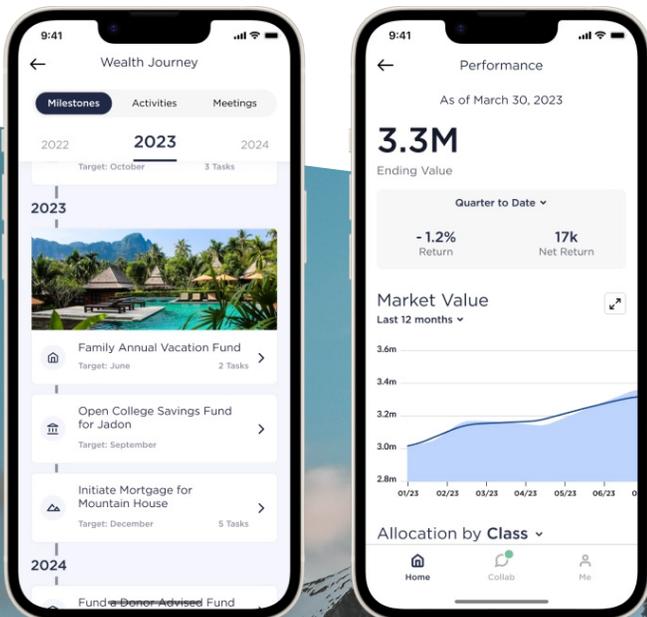
Working closely with Vincimus to address the firm's specific needs and leveraging its deep expertise in alternative investments, Summit developed a solution that automated and radically simplified Vincimus' reporting capabilities.

Vincimus Capital knew they needed a tech partner who mirrored their own innovative spirit. Enter Summit. Beyond just the technology, a powerful synergy emerged — a shared entrepreneurial drive and a mutual hunger to break new ground. This wasn't just a partnership, it was a true collaboration.

The solution was a true partnership and co-creation, with a platform focused on streamlining and cleanliness. And getting started was surprisingly easy. "We basically gave them our raw data and they did the rest," said Phillips. "It was very turnkey." Summit's single-tenant software and a robust data lake, for example, ensured flexibility and adaptability in data management.

By providing customized solutions and handling the migration process seamlessly, the Vincimus team was able to focus on their core operations and client relationships while Summit handled the technical aspects.

"In Summit, we found more than just a technology solution. We found a shared commitment to humanizing the technology and achieving enduring excellence," said Phillips.



The Results:

Pioneering the path to their own Summit.

The impact of Summit's solution was immediate and profound — and apparent to the Vincimus team in ways they never before experienced. Their platform was something new, modern, completely bespoke, and well-beyond the limitations of the archaic technologies they'd previously had to work with (and explored as part of their due diligence process).

"We were continually impressed with Summit's genuine care and the team's ability to understand and distill complex needs into simple and elegant tech solutions. It stood out among their competitors — and trust me, we did our homework and looked closely at several of the biggest providers out there," Phillips continued.

And it wasn't just the team at Vincimus that were so impressed. Phillips reported that every single client embraced the new portal with enthusiasm, praising its user-friendly interface and intuitive design. In short, it provided them with a delightful experience.

The recurring theme from clients was they wished they could have had this all along, said Phillips.

But the true measure of success has been found in the deeper connections forged between advisors and clients.

The simplified data presentation not only save time previously spent on manual tasks but also improves the accuracy, reliability and therefore confidence in the reporting. By transforming the wealth journey into a narrative structure, Vincimus can now deepen client relationships, moving beyond mere financial transactions to focus on the broader significance of wealth as a tool for realizing personal goals and aspirations.

“Summit’s solution is a game changer; dynamic, intuitive, and tailored to our needs. They spoke our language, understood investor needs first-hand, and offered visionary solutions to accomplish our goals. Without Summit, we’d still be drowning in spreadsheets. It’s precisely what we needed.”

Morgan Phillips, COO of Vincimus Capital



The Future:

Like Shackelton, a journey to discover untapped potential.

At its core, Vincimus embraces a philosophy that emphasizes the journey over the destination — and understands the importance of innovation and unwavering determination to reach their goals.

Prioritizing “the journey” helps Vincimus ascribe meaning to their clients’ wealth, and helps them build a relationship that transcends value based on a performance benchmark alone.

And, as the team looks to the future, the partnership with Summit only grows stronger.

Summit’s user interface puts client values at the center of the user experience, empowering Vincimus’ clients to navigate their financial journeys with the tools and support they need to make informed decisions about their wealth.

Integral to the firm’s vision is the concept of stewardship, and it’s something that has been made even easier thanks to the solutions Summit provides. By facilitating deeper, more meaningful conversations between advisors and clients, Vincimus ensures that stewardship remains at the heart of its service, guiding individuals toward their financial goals while prioritizing the greater good.

And, just like explorer Earnest Shackleton, allows Vincimus to pursue the promise of potential with unending conviction.

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