ETON
SOLUTIONS

ATLAS A FIVE®

Let humans do human work.

ETON

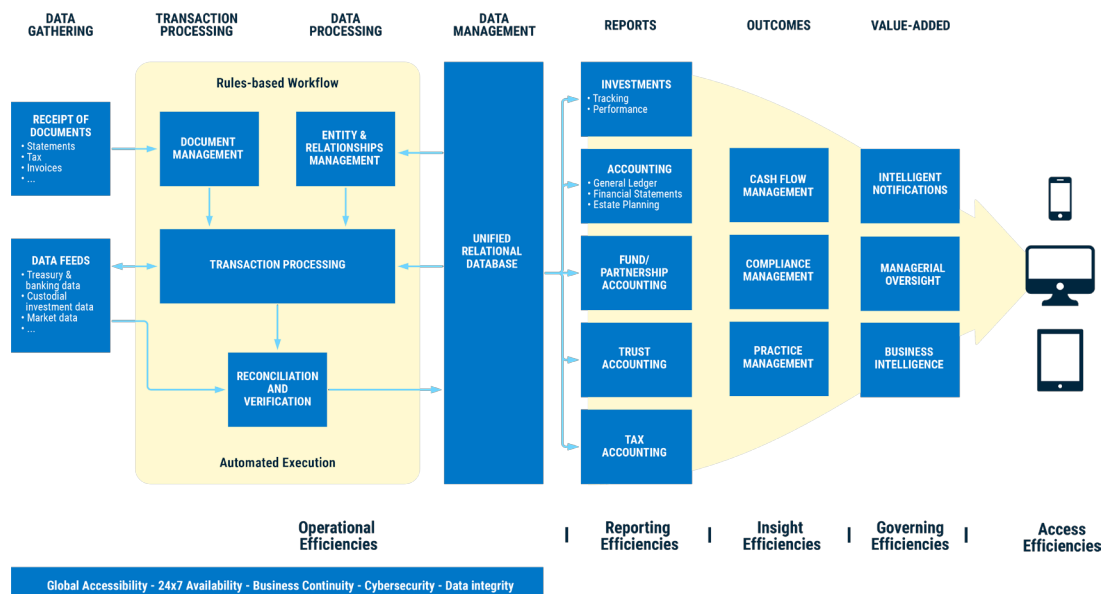Inspire **Trust**. Discover **Clarity**. Nurture **Relationships**.

Enable high-value humans to do high-value work.

Burdened by manual, routine, and inefficient processes, your high-value employees are left doing low-value work. Not because they are poor performers; ironically, quite the opposite is true—they are extremely efficient at executing inefficient processes. What would their output be if you were to streamline and automate these processes? Imagine if your most valuable, senior employees could be strategic and proactive—if the humans were empowered to do human work.

Software to manage the data, humans to provide the insights.

Data entry and reconciliation by humans into Excel spreadsheets, Quickbooks, or other point solutions, is antiquated, time-consuming, and error prone. By implementing our software, AtlasFive®, you let computers do the heavy lifting. Removing people from the processes not only transforms your efficiency and accuracy, it opens up a new world of possibilities for what your employees can achieve. A 2022 Harvard Business Review article titled *Using Technology to Make Work More Human* recognizes the strength of this human/tech collaboration, noting that "smart tech can actually help rehumanize work...Rather than doing the same work faster and with fewer people, smart tech creates an opportunity to redesign jobs and reengineer workflows to enable people to focus on the parts of work that humans are particularly well-suited for, such as relationship building, intuitive decision making, empathy, and problem-solving."
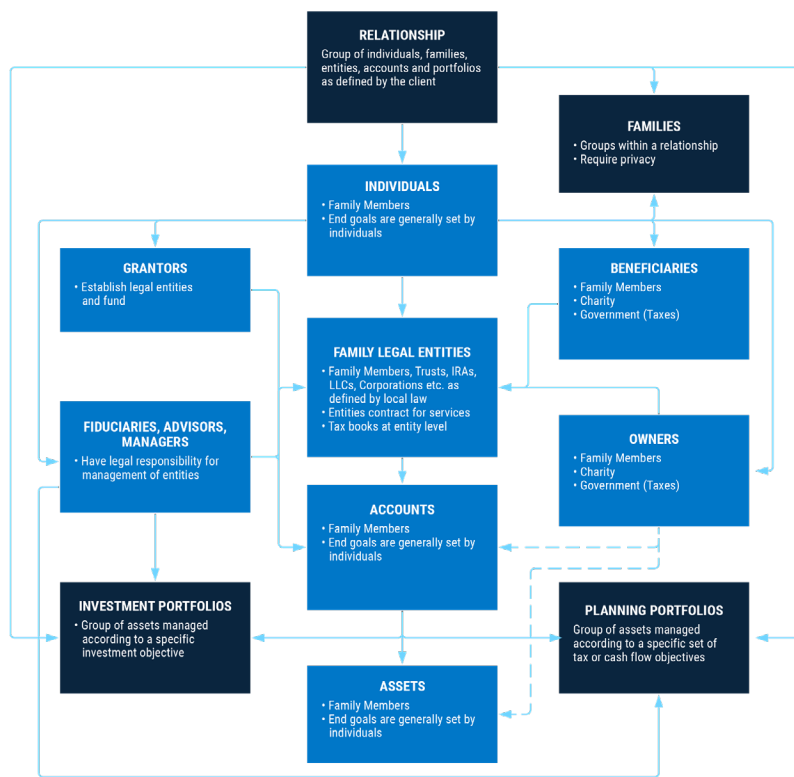
The graphic below illustrates what your processes would look like using AtlasFive. Created by a family office, our award-winning data model includes key elements such as automated data collection and reconciliation, interconnectivity and integration, information access and transparency, enhanced cybersecurity and risk management—resulting in a rehumanized, reimagined workplace.

A data model based on relationships and interactions.

What sets AtlasFive apart is that it reflects the "true world" of a family office. Knowing how everything is related is of paramount importance to have effective family office technology.

All the relationships and linkages between entities, individuals, assets, liabilities, accounts, and transactions define the operational management of the family office. This is the data model needed to offload burdensome tasks from employees and enable the software to do the work.

RELATIONSHIP
Group of individuals, families, entities, accounts and portfolios as defined by the client

FAMILIES
• Groups within a relationship
• Require privacy

INDIVIDUALS
• Family Members
• End goals are generally set by individuals

GRANTORS
• Establish legal entities and fund

BENEFICIARIES
• Family Members
• Charity
• Government (Taxes)

FAMILY LEGAL ENTITIES
• Family Members, Trusts, IRAs, LLCs, Corporations etc. as defined by local law
• Entities contract for services
• Tax books at entity level

FIDUCIARIES, ADVISORS, MANAGERS
• Have legal responsibility for management of entities

OWNERS
• Family Members
• Charity
• Government (Taxes)

ACCOUNTS
• Family Members
• End goals are generally set by individuals

INVESTMENT PORTFOLIOS
• Group of assets managed according to a specific investment objective

PLANNING PORTFOLIOS
Group of assets managed according to a specific set of tax or cash flow objectives

ASSETS
• Family Members
• End goals are generally set by individuals

AtlasFive supports all core business functionality.

Offices that implement AtlasFive see improvements to productivity. Operational efficiencies benefit from one transaction processing workflow, and reporting is simplified through the single entity-based data model. Functionality includes:

- Portfolio Management
- Performance Reporting
- Custodial and bank data
- Accounting - General Ledger, Fund/Partnership
- Entity Management
- Document Management
- Cash Management
- Risk Management
- All Assets and Liabilities

AtlasFive transforms challenges into solutions and solutions into opportunities.

Family Office Challenge	The AtlasFive Solution
Clients lack access to timely data in useful formats	Daily data feeds and reports make relevant information available to staff and clients – when and where they need it, which supports real-time, actionable insights
Staff time is consumed by duplicative data entry and manual processes due to multiple systems	Modern AI tools automate processes and reduce errors
Use of disparate software requires staff to depend on multiple spreadsheets to compile relevant reports	All data is stored and processed on a single platform and customizable reports make it easy for staff to "slice-and-dice" information to meet client needs without duplicative manual labor
Clients have numerous entities with unique contributions, allocations, and distributions to specific beneficiaries	Automatically book complex fund transaction and allocation scenarios with a single fund transaction

The family office of the future: integrating technology and personnel.

People are the family office's most valuable asset. Their industry knowledge, creativity, and insights elevate the family office role from a simple data center to a resource that makes complex analyses and provides actionable insights to its family members. When integrated with technology, the low-value tasks are accomplished by software instead of humans and office staff experience the freedom to focus on achieving long-term business goals.

It's a win-win: machines are better and faster at data entry and processing, resulting in fewer errors and quicker reporting, and humans are freed from menial tasks and encouraged to work on more valuable, complex problems. The office becomes more efficient and staff achieve more when humans are left to do human work.

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