



ETON
SOLUTIONS

Transform your family office.
Reimagine your value.

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The best part about working with Eton is the transparent conversations we have. They are proactive, and working with them never feels like going to battle—we are partners.

President (An International MFO)

Who is Eton Solutions?

Eton Solutions is a software and services company that was founded to handle the complexities associated with servicing ultra-high net worth clients. Our vision is bolstered by a belief that a holistic, integrated platform and support from a team of skilled experts can enable single family offices, multi-family offices and professional services firms to completely reimagine the value they can provide to their clients.

We were founded by leaders with decades of experience in family offices, so we know the challenges these offices face: we faced these same challenges every day for years, which is why we set out to solve them. Our priority is giving family offices the tools they need to be more accurate, more efficient, and more effective at delivering premium services to their valued clients.



\$737+ billion
managed on our
platform



350+
dedicated employees
from around the globe



Worldwide
support and services in
all time zones



\$40M+
in product development
over the last 2 years
in key areas: fund
accounting, tax ledger,
and AI-driven transaction
processing

Leading the family office into the future.

Our solution to the challenges family offices face is our integrated platform, AtlasFive. It acts as an operational platform and one source of truth for all of your data, which improves **accuracy**, **optimizes efficiency**, and **reduces risk**.

As the future of the family office evolves, we are proud to lead the way to reimagining what a family office can achieve. With less time spent on recurring tasks, data entry, and spreadsheets, employees can **focus on the office's priority: achieving the goals of the family it serves.**

A family office solution created by a family office.

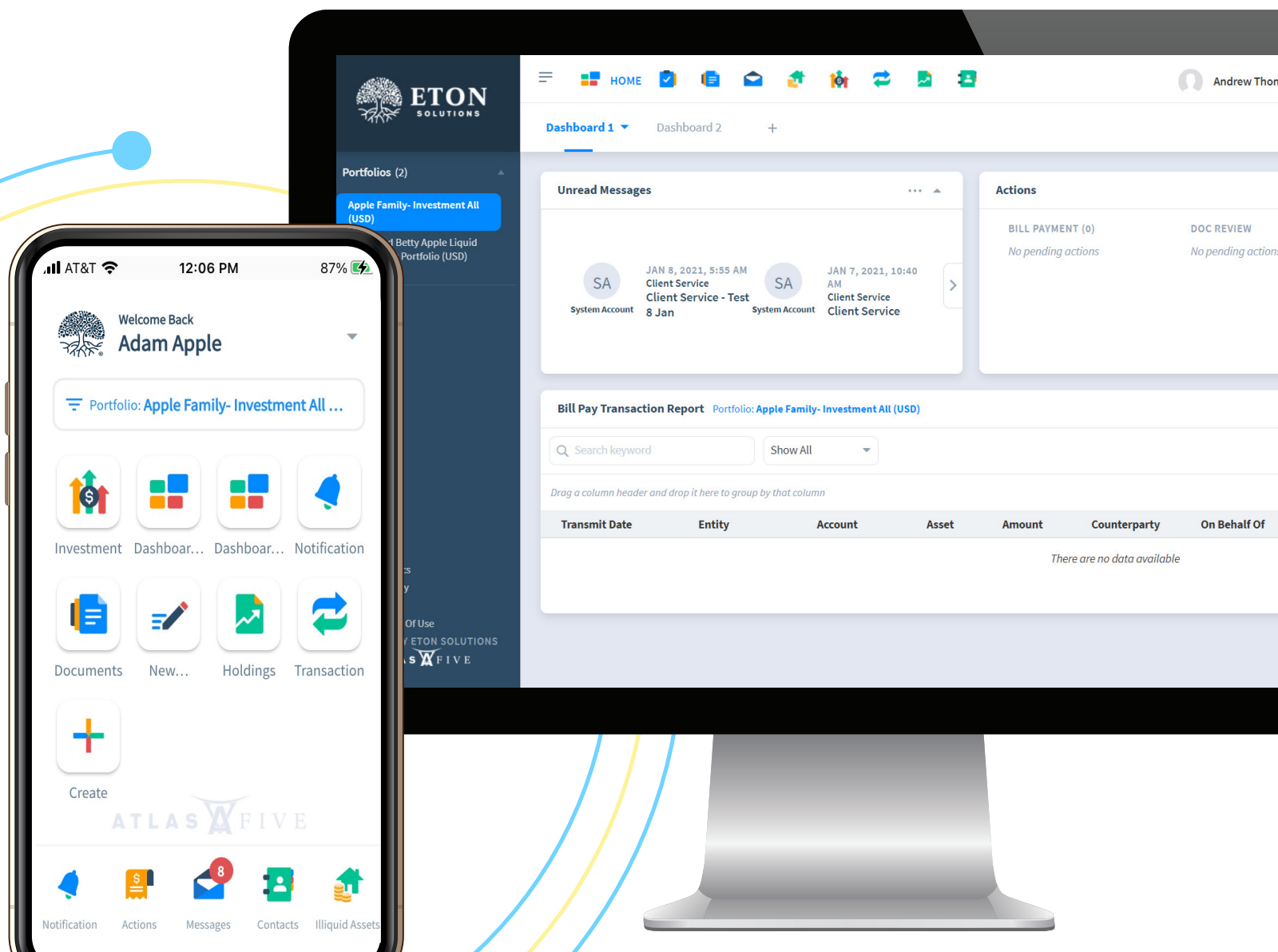
Eton Solutions platform, AtlasFive®, was founded by family office leadership who saw a need for an integrated software solution and decided to create one. Our years of experience in the industry shaped the development of AtlasFive which acts as a single source of truth for all the data in a family office.

Our transformative solution is the result of 10+ years of development and investments — a product that strategically improves operating and reporting efficiency so that office staff can better utilize their domain expertise with more complex, valuable tasks.

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In a global, digital world, the ability to access everything we need through their solutions allows us to seamlessly serve our clients no matter where we are.

Partner (Large MFO)



Rethink what you can achieve with AtlasFive.

By reimagining the traditional siloed management systems used in family offices, AtlasFive enables your office to take a holistic approach to family wealth management. It simplifies reporting and centralizes processes — two routine tasks that deprive employees of time that could be spent on long-term goals and other value-added activities. Its ability to quickly catch errors can minimize the time your employees spend correcting mistakes and greatly increases transparency.



A single source of truth = simplified processes, improved accuracy, optimized efficiency

Solve challenges and improve performance.

By facilitating operating leverage, data integrity, and risk mitigation, AtlasFive supports and enhances your office's current processes and improves their accuracy and efficiency. Data governance and cybersecurity are at the core of AtlasFive, so you can rest assured that your data is always secure.

Key benefits include:

- Complexity is minimized through best practice business processes, templates, and workflows.
- Process management proactively provides efficiencies and reduces costs.
- Auditable tasks optimizing business processes and workflows provide transparency, segregation of duties and risk reduction.
- Move from manual tasks to higher level value-add for the family.
- Deliver reports and answer questions faster and more accurately.
- Enhance staffing and training by systemizing knowledge.

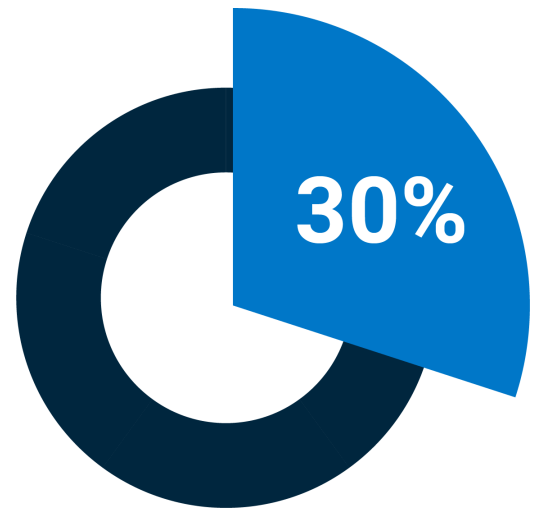
One source of truth that reimagines efficiency.

Reimagine operations:

AtlasFive has one transaction processing workflow that initiates all family office operations and simultaneously records these transactions on the investment ledger, general ledger and tax ledger. By using the taxonomy required, all of your ledgers are in sync at all times and everything you need to process a transaction is in one place.

Reimagine reporting:

Our family office focused data model allows you to say goodbye to reconciling reports. AtlasFive is built on the nuances of family office reporting needs and is able to supersede all the traditional reporting barriers. No more Excel spreadsheets that combine several reports for end of the month recording because now the database and ledgers are always up to date and you can even access information at the most granular level (transaction, account, entity, and individual.)



Office Time Spent on
Routine Tasks

Reimagine what you can achieve.

Reimagine what your office can do with more time, more accuracy, more transparency, and less data management. Relieve high-value employees from routine tasks so they can focus on the client relationship, and set your office up for continued success — today and in the future.

Transform your family office, reimagine your value and become
the family office of the future with Eton Solutions.



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Eton Solutions is a software and services company founded to handle the complexities of servicing ultra-high-net-worth families. Created by family office leaders, Eton Solutions' flagship product is AtlasFive, an integrated platform with over \$737+ billion in assets under administration that holistically aggregates and manages all your office's data, reporting, and workflow processes. With one source of truth, Eton Solutions leads family offices into the future by maximizing efficiency and minimizing errors and risk.

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