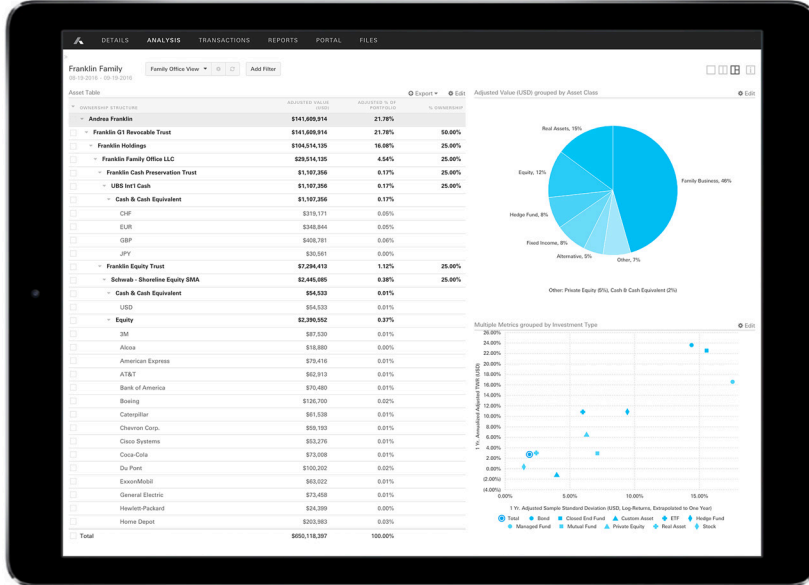




# Modern Technology for Single-Family Offices



What type of family office would benefit from Addepar? Those with complex portfolios (for which Excel alone does not suffice), sometimes including:

- Diversified asset classes, including alternative investments
- Complex legal entity ownership hierarchies
- Multiple custodians
- Multiple managers
- Multiple currencies

“Addepar removed the massive challenges we faced before. We can now run a performance report across any entity, make templates for efficiency, or customize an *ad hoc* report whenever we want - it’s very easy. It makes analytics so much faster, more reliable, and simple.”

**Caxton Alternative Management**  
Family office based in New York

## Optimize Your Family Office with Addepar



### Enhance security & privacy

We have a team of fully dedicated security experts who worry about your cyber safety, and most notably, passed multiple-year diligence & vetting processes of several large banks.



### Make more informed investment decisions

Addepar’s technology can handle multi-currencies, multi-asset classes (including alts), and complex ownership structures.



### Save time and money: streamline operations & repurpose staff.

We’ve built tech to do the things that computers can do better than people, freeing our clients to do the things that people are better at than computers.



### Facilitate communication amongst stakeholders

Enhanced reporting adds transparency to complicated ownership structures and family assets. Our customizable portal provides access to stakeholders such as accountants, lawyers, *et al.*

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