Eton Solutions offers a comprehensive enterprise management system and service for the single and multi-family office space, by offering a full suite of CRM, data aggregation, investment reporting, general ledger, and transaction initiation. The solution is a world class platform facilitated by a proprietary process and role-based workflow functionality.

The life of a transaction in a single system
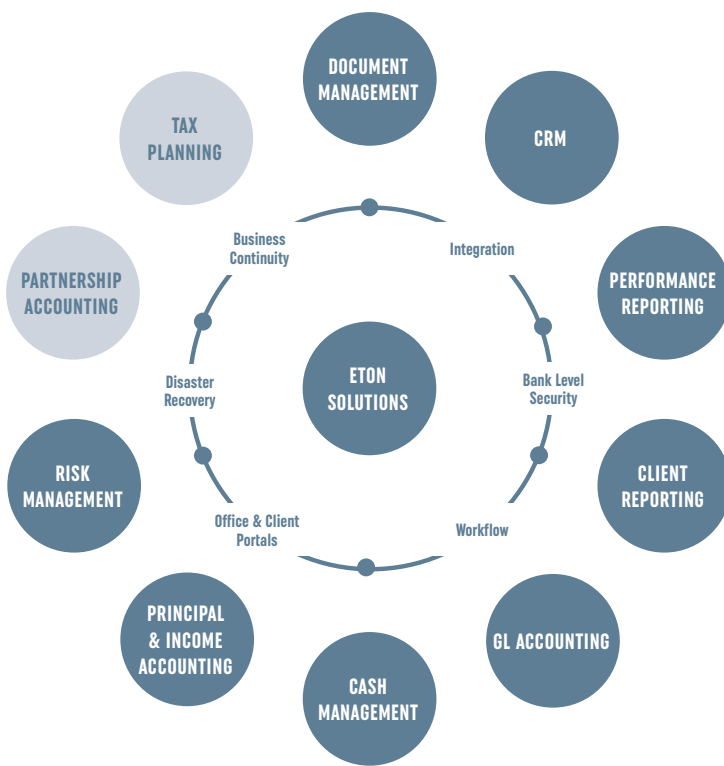
The Eton Solutions platform is an integrated solution with application functionality covering:

- Relationship Management
- Investment Management
- Accounting/GL
- Document Management
- Reporting

System Features:

Integrated System
- Data entered once
- One user interface
- Maintenance of data at lowest level of granularity
- All data available for reporting

Role and Relationship Based Secure Access
- Access to each system component, document, task, event, data screen, workflow, etc. controlled by permissioning at the relationship level, based on a user's assigned role(s)

The Platform has a single database. Data, documents and transactions are available to all functions.

Operations
- Bill Pay / Cash Management
- Investment Ledger

Document Management Accounting
- Expense Management
- General Ledger

Investment
- Security and Fund Master
- Investment Benchmarks and Objectives

Relationship Management
- Client and Entity Management
- Vendor Set Management