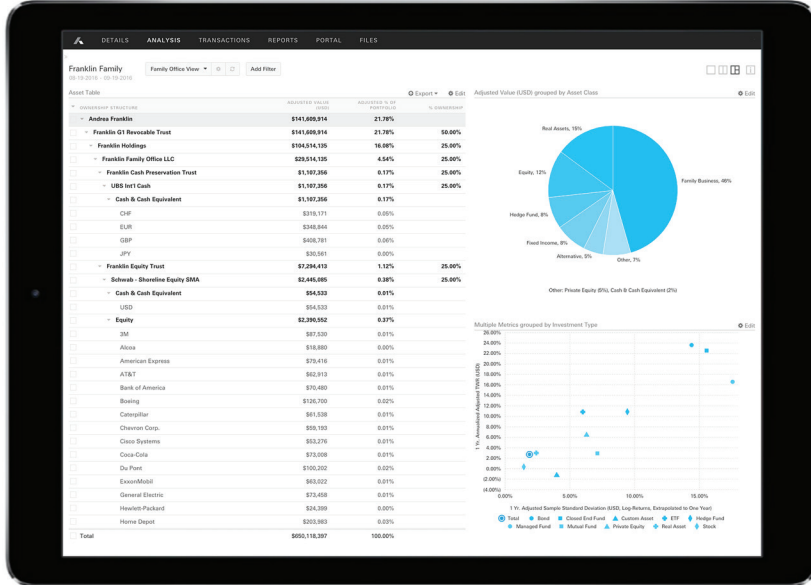




Modern Technology for Single-Family Offices



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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