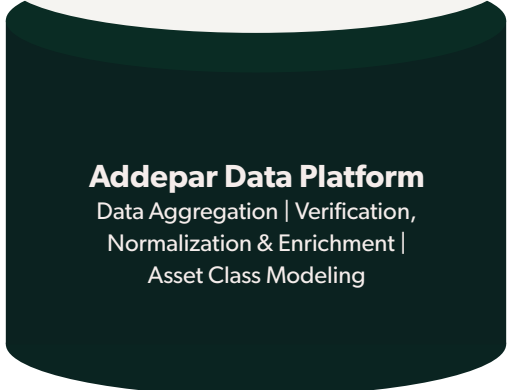
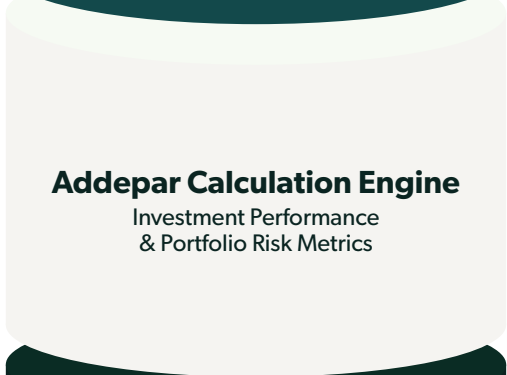
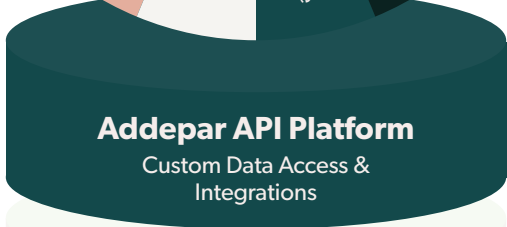
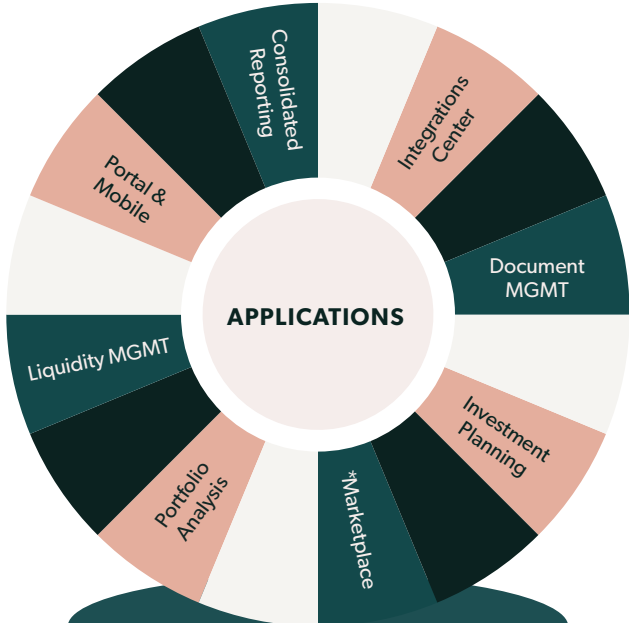


A Technology Foundation That Delivers True Peace of Mind

FAMILY OFFICE GUIDE

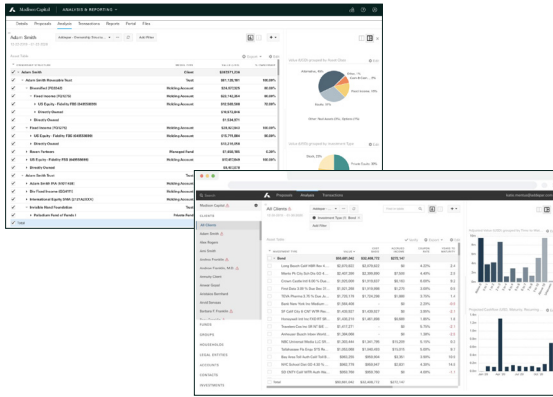
Family offices face many operational challenges to keep pace with the growing demand for data transparency. Serving as a technology foundation for hundreds of family offices, Addepar helps manage the complexity of data aggregation and modeling, extending the benefits to power everything you do—whether within Addepar or other downstream systems within your office.



“Addepar succeeds its competitors in customization, reporting, speed, accuracy, and flexibility across all asset classes.”
– CAMCapital™

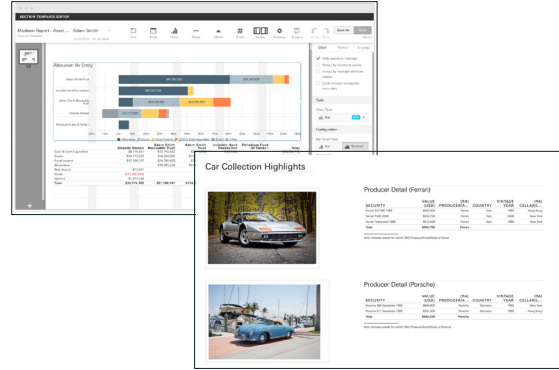
Preserve Wealth With Modern Technology

ALL YOUR DATA AT YOUR FINGERTIPS



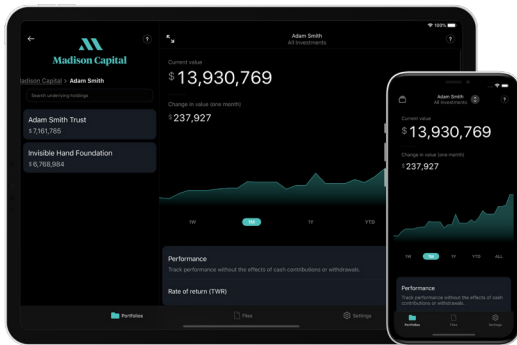
Centralize family financial information in one place for greater transparency and better control—with a focus on privacy and security. Efficiently capture total family net worth and accurately model family ownership and investments across all asset classes.

BETTER DECISIONS BUILT ON FAMILY PRIORITIES



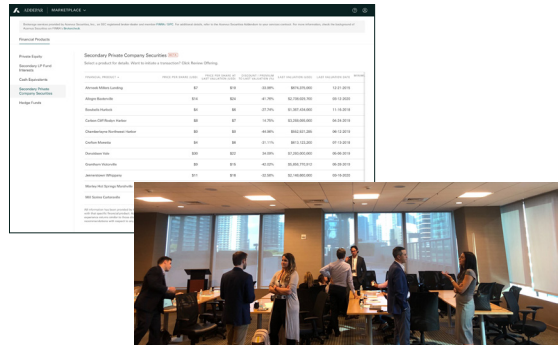
Manage liquidity and access powerful portfolio analytics to facilitate strategic decision-making. Personalize your analysis and assess performance, risk and exposure as needed.

CUSTOM COMMUNICATION ACROSS GENERATIONS



Strengthen family engagement with easy, individualized communications. Create desired reports and leverage our online portal or mobile apps to share portfolio insights in real time.

EXTENDED COMMUNITY AND SUPPORT



Grow your network, and gain access to unique investment and private-market placement opportunities for optimal family-legacy wealth management. Helpful training and timely assistance are always available.

*All brokerage services offered through Acervus Securities Inc., member FINRA / SIPC, an Addepar Company.