



# Reimagining Technology for Wealth Management

Addepar is the result of the hard work of many talented people, such as CEO Eric Poirier. It is our passion to create a forward-thinking financial platform that connects data, technology and investment options, with everyday people.

“Good technology should fade away  
and allow humanity to stand up.”

Eric Poirier, CEO



Joe Lonsdale, Founder

Eric Poirier, CEO

## How can you, as the advisor, deliver more for your clients?

### WHAT CLIENTS WANT AND EXPECT

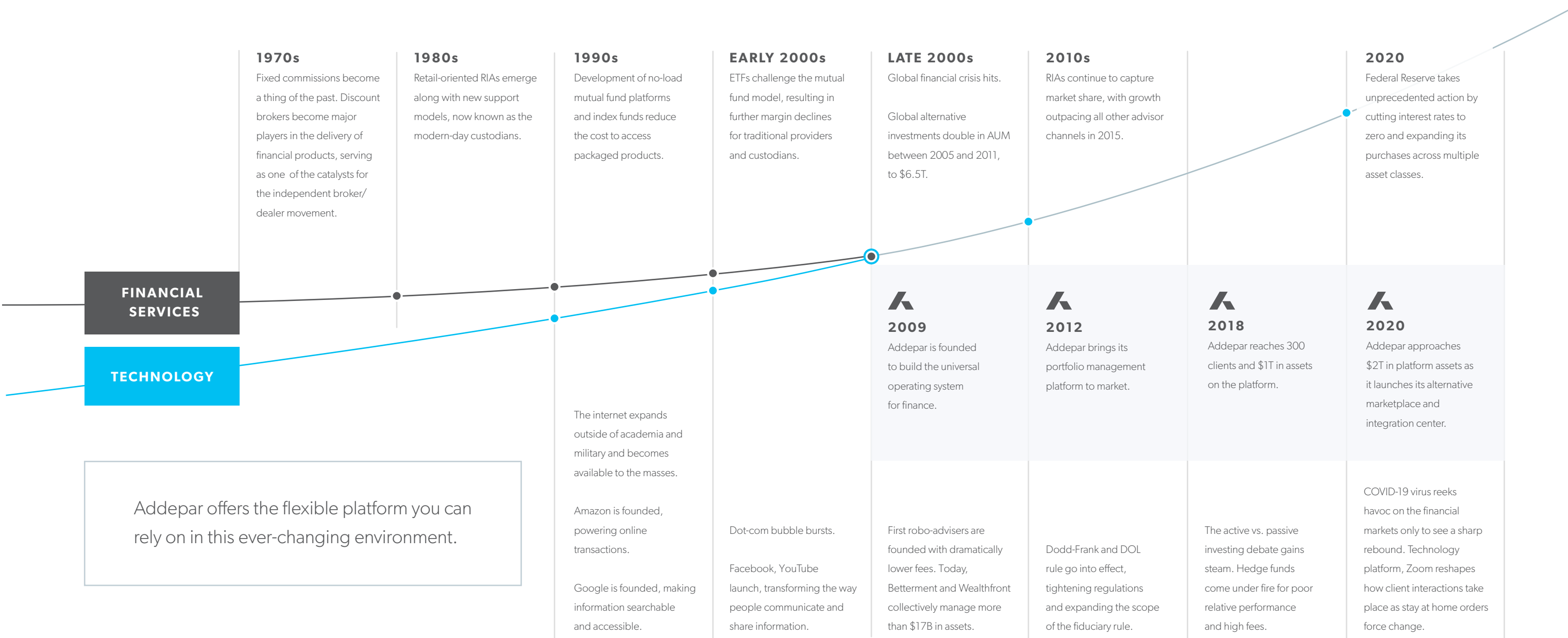
- Trusted advisor they can hold accountable
- Tailored advice that helps them realize their goals
- Complete view of their wealth with immediate access to their financial information
- Amazing client experience and a greater value for fees

### WHAT THIS REQUIRES FROM YOU

- Confidence in your people, processes and tools
- Immediate access to accurate data
- Execution at the highest level, from operational efficiency to exceptional client service
- Ability to scale without losing the personal touch

Clients expect more than ever. How do you differentiate your services in this ever-changing environment?

# Change is the only constant in the financial services industry



**FINANCIAL SERVICES**

**TECHNOLOGY**

Addepar offers the flexible platform you can rely on in this ever-changing environment.

The background features a dark blue gradient with a pattern of horizontal lines and small dots, resembling a stylized staircase or a digital grid. The lines are light gray and the dots are a slightly darker shade of gray. The text is centered and rendered in a white, serif font.

# Reimagining technology for wealth management

# Addepar— empowering you and your business

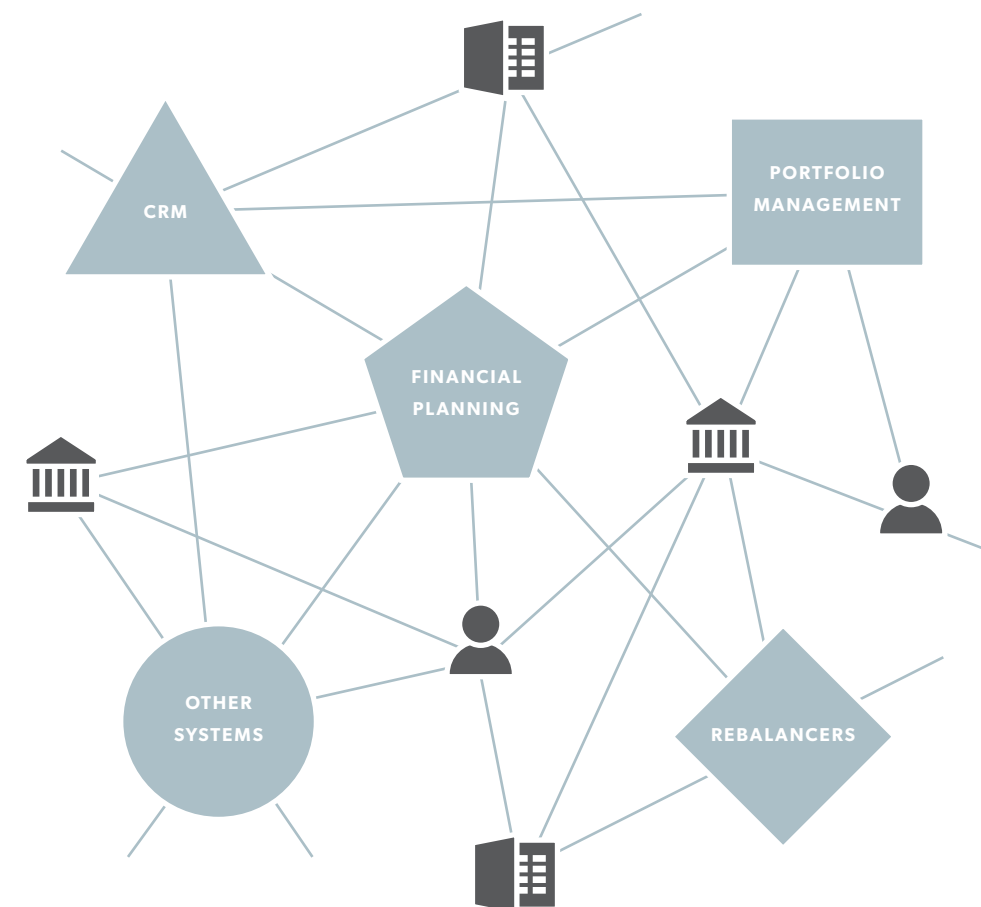
“Technology should do the hard work, so people can get on doing the things that make them happiest in life.”

**Larry Page**

Co-founder, Google Inc.  
CEO, Alphabet Inc.

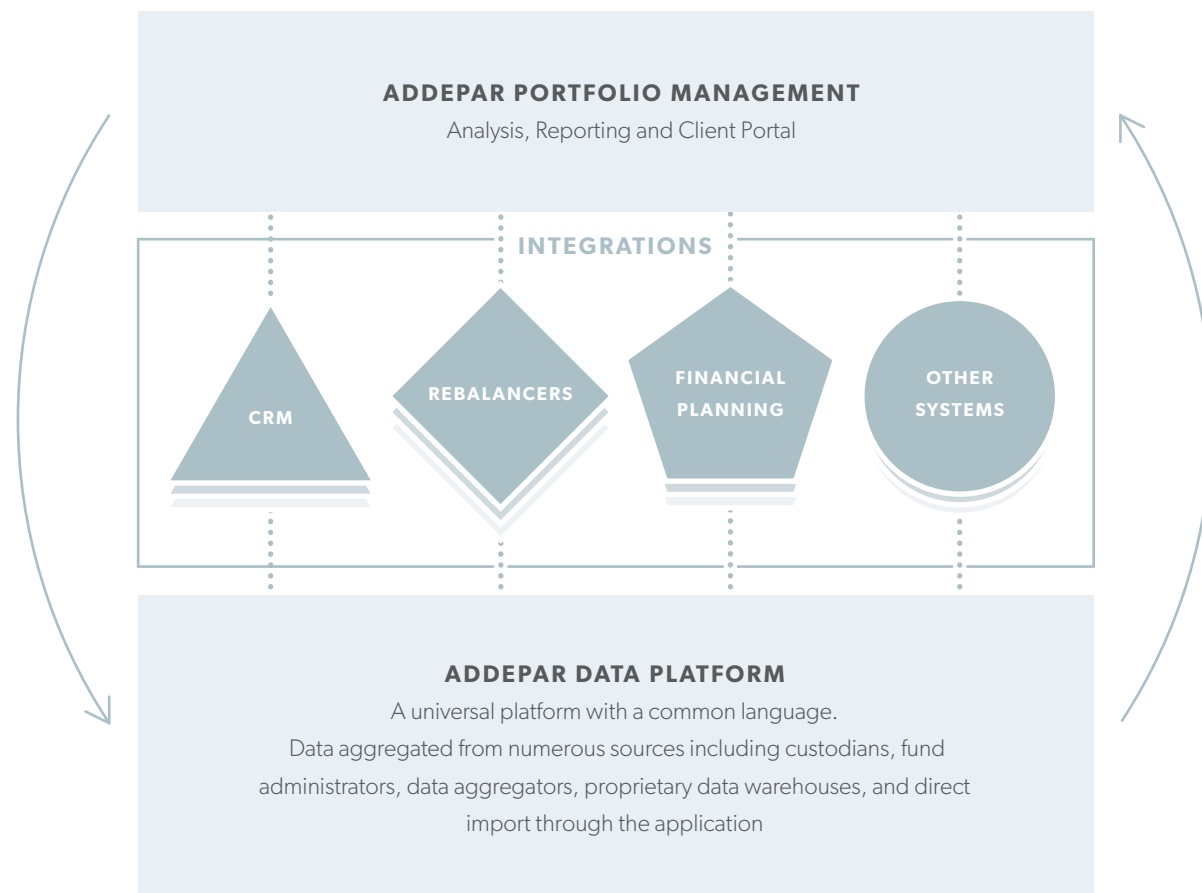
## The old way

There has been a reliance on a complex and brittle combination of people, spreadsheets and antiquated systems. The industry lacks a common language, central data platform and neutral infrastructure to unify its parts. This makes your job harder, adding layers of manual burden and inefficiencies.



# The Addepar way

We are rethinking basic processes and building them around modern technology. This gives asset owners and advisors a platform to capture and aggregate data from multiple sources and then present it in the most intuitive, client-centric, and impactful ways.



## What you get from Addepar

- ✓ Secure, immediate access to clean, complete data
- ✓ Transparency into portfolios
- ✓ Modern delivery channels for sharing information and communicating with clients
- ✓ Ability to customize at scale, increase operational efficiency and differentiate your services
- ✓ Real-time analysis of portfolios

## How you can deliver for your clients

- ✓ Serve as a trusted advisor they can hold accountable
- ✓ Provide tailored advice that helps them realize their goals
- ✓ Give them a complete view of their wealth with immediate access to their financial information
- ✓ Deliver an amazing client experience and greater value

## HIGH-PERFORMANCE ANALYTICAL ENGINE



COMpletely CUSTOMIZABLE REPORTING

# Addepar Platform

Our portfolio management platform is cloud-based, secure, automated, fast, and scalable.

01

## DATA AGGREGATION & RECONCILIATION

All your data. All in one place.

02

## PORTFOLIO ANALYSIS

Real-time analysis of portfolios.

03

## REPORTING & PORTAL

A client-centric reporting experience.

04

## INTEGRATION CENTER & API

Connect business-critical systems to increase operational efficiency.

05

## MARKETPLACE

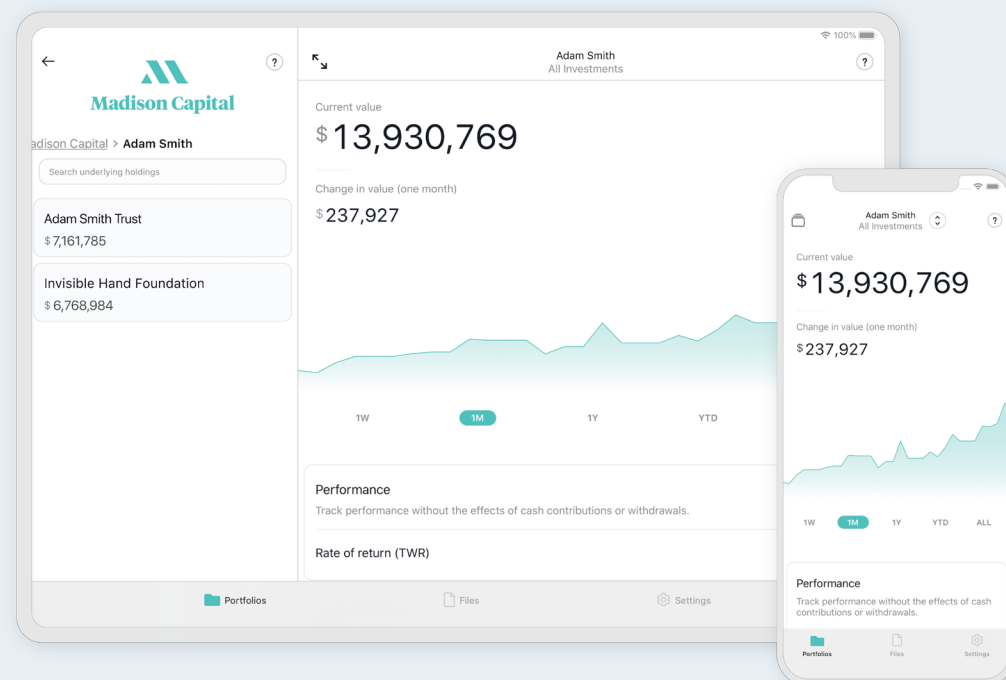
Access a variety of alternative products from a range of providers.

06

## COMMUNITY

Forum for peer to peer idea and best practice sharing.

## MODERN DIGITAL EXPERIENCE



# Addepar Services

From your first engagement with our team to your daily work on the platform, we are committed to providing you with the best client experience.

## AVERAGE CUSTOMER SATISFACTION SCORES

4.6/5

Clients consistently report that interactions with the **support** team exceed expectations

4.5/5

Clients consistently report that their experience during **implementation and onboarding** exceeds expectations

## YOUR JOURNEY

### Getting Started

Detailed statement of work covering implementation and overall project plan.

### Establishing Trust

Coordinated with a dedicated project team—to ensure smooth implementation and onboarding.

### Regular Touchbases

Be assigned a Personal Account Manager with direct industry knowledge for project enhancements.

### Troubleshooting Hotline

Centralized support desk that can handle all inquiries.

### Ongoing Educational Support

Our on demand Help Center and Addepar Academy provides online and in-person training.



# What our clients are saying

"Addepar is light-years ahead in every category as it relates to customization."

**John Porter**

Founder,  
Three Bell Capital

"We've been able to grow our business, provide customized reports and maintain a 99% client retention rate—all without investing in additional human resources for reporting."

**Paul Pagnato**

Founder,  
PagnatoKarp

"Addepar is the first performance reporting platform that easily handles all of our assets, connecting our client's financial goals and objectives with real-world insights."

**Daniel Guy**

Head of Almanack's Advisor Services,  
Almanack Investment Partners

"Addepar is a great system partner with the engineering power and flexibility that give our clients what they want and what we've always wanted to be able to provide."

**Michael Tiedemann**

CEO,  
Tiedemann Wealth Partners

"If the technology community is going to turn their minds to a problem, they're going to push the ball forward really rapidly. And that has been the case with Addepar."

**Mike Brabant**

Managing Director, Head of Wealth Management Business Development,  
Jefferies

"The Addepar training session did exactly what we wanted—it helped us understand the nuances and building blocks of generating and creating reports with speed and depth. We are now extremely comfortable delivering the highest-quality reporting to our clients."

**Tom Baker**

Partner,  
Blue Oak Capital

"Our approach is helping us attract clients, and it will keep them with us for decades to come. Addepar improves the client experience, and helps our team work more productively. Basically, Addepar lets us deliver big and stay small."

**Ricardo Litvak**

Founder and CEO,  
Litvak & Co.

"Addepar scales our custom approach without having to grow our back office at the same rate. You do something once and share it across the firm. We're growing at a pace that would have been impossible without Addepar."

**Chris Hale**

Chief Operating Officer,  
Perigon Wealth Management

# The Addepar Team

Our mission is to build a technology platform that ignites innovation in the financial industry, and makes investing more data-driven, transparent and impactful for all of us.



“We’ve spent our careers at the intersection of financial services and innovative technology. We help businesses make sense of complex datasets to solve their hardest problems.”

**JOE LONSDALE**  
Founder, Chairman

Founding partner at 8VC, Formation 8  
Co-founder of Palantir  
Board Member of OpenGov, Oscar,  
Illumio, Radius, Hyperloop One, Wish  
BS Computer Science at Stanford

**ERIC POIRIER**  
CEO

Joined Addepar in January 2013  
Director, Palantir Finance 2006-12  
Lehman Brothers FI Analytics 2003-06  
BS Computer Science at Columbia

# Our Investors

Addepar has the commitment of long-term investors with a track record of backing game-changing technology.

KEY INVESTORS INCLUDE:

**VALOR**  
EQUITY PARTNERS

8VC

**WESTCAP**

“Having operated and grown fintech companies serving both public and private markets for the last 30 years, I am highly confident in Addepar’s trajectory—the company is perfectly positioned to arm advisors and investors with the best data, technology and products in order to make confident, data-driven decisions in a scalable way. Our investment supports our belief in the tangible value they provide, no matter the market conditions.”

**Scott Ganeles**  
Partner,  
WestCap

“The idea of a common language and a truly universal data platform for the financial services world is something Wall Street 10 years ago could never have imagined. Addepar has not only imagined it, but achieved it, pioneering a fast-growing, new market that will revolutionize the way data drives finance.”

**Antonio Gracias**  
Founder, Managing Partner  
and Chief Investment Officer,  
Valor Equity Partners



[addepar.com](https://addepar.com)

+1 (855) 464-6268

[inquiries@addepar.com](mailto:inquiries@addepar.com)

**Mountain View**

303 Bryant Street  
Mountain View, CA 94041

**New York**

335 Madison Ave, Suite 1430  
New York, NY 10017

**Salt Lake City**

460 West 50 North, Suite 125  
Salt Lake City, UT 84101