

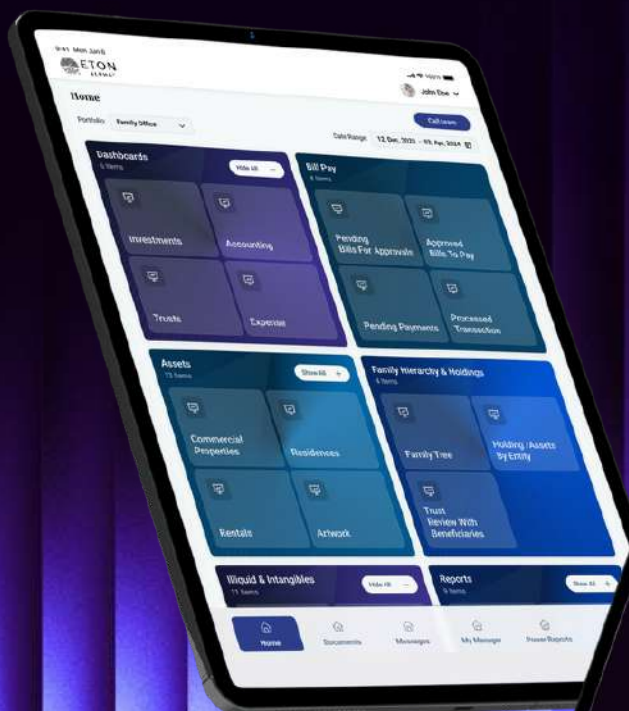


ETON
ALPHA™

EtonAlpha™ The Alpha in Wealth Intelligence.

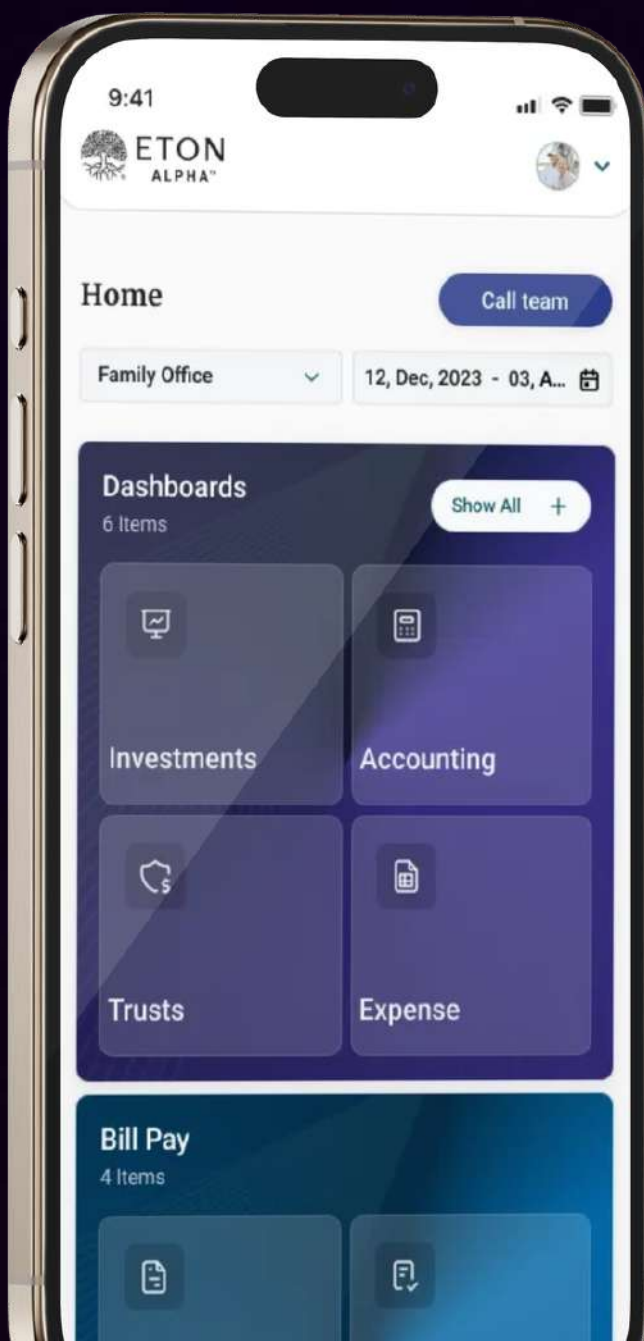
All Your Global Wealth. One Intelligent Platform.

For those who demand clarity, control, and confidence, EtonAlpha™ unifies every account, asset, and report into one secure platform, giving you the complete picture of your wealth, anytime, anywhere.



The Legacy

Born from Real-World Wealth Expertise.



EtonAlpha™ was created by wealth-management professionals who understood the challenges of today's complex financial landscape.

Built from the inside out, it combines the precision of institutional-grade technology with the simplicity and service of a private concierge.

Whether managing cross-border assets, multiple entities, or global portfolios, EtonAlpha™ delivers clarity and confidence for those who expect excellence.

With EtonAlpha™, you gain a single source of truth for your global wealth, reconciled daily, secured by enterprise-grade technology, and ready for every financial decision.

Introducing EtonAlpha™

What You Can Do with EtonAlpha™



Instantly view your complete financial picture, consolidated net worth, and performance at anytime, from anywhere



Oversee trusts, entities, and estate structures in one place



Organize and secure all documents in an encrypted vault



Track capital calls, distributions, and valuations with ease



Simplify bill pay, approvals, and expense management



View consolidated cash-flow and liquidity analysis in near real time



Manage accounting, reconciliation, and performance reporting



Automated reports to assist in preparing tax returns and compliance

Key Benefits

Confidence. Clarity. Control. Simplified.



Ultimate Privacy

ISO 42001, ISO 27001, ISO 27701,
SOC 1 Type 2, SOC 2 Type 2.



AI-Driven Insights

Turn complex data into clear,
actionable intelligence.



Flexible & Scalable

Grows with your assets, entities,
and needs.



Leading-Edge Interface

Seamless access across web
and mobile.



Save Time

Automate reconciliations,
workflows, and reporting.



Decision-Ready Data

Integrated, accurate, and audit-ready.

Technology Capabilities



Near Real-Time Dashboards & Consolidated Reporting



Multi-Entity Accounting & Performance Analytics



Secure Document Vault & Workflow Automation



Client Portal & Mobile App Access



Role-Based Permissions & Audit Trail

Connected Services



Bill Pay & Expense Management



General Ledger & Partnership Accounting



Investment Reconciliation & Valuation Tracking



Tax Preparation Readiness, Data Ready For Filing



Trust Accounting & Estate Transparency



Cash Flow & Liquidity Analysis

Global Scale, Proven Results

Trusted by the World's Most Sophisticated Wealth Owners.

\$1.42
Trillion

Assets on Platform

167K Entities
61K Accounts



1028+

Families on platforms

4,398 Relationships
4,326+ Total Users
Across 12 Countries

\$50
Million

In product development

512 Employees

+24.5
Million

Transactions

\$65 Billion Payments Reported
\$30 Billion Initiated
350K Transactions/Invoices
113K Vendors/Payees



225K

in securities

134K Illiquid
91K Marketable



3.1 Million

Documents

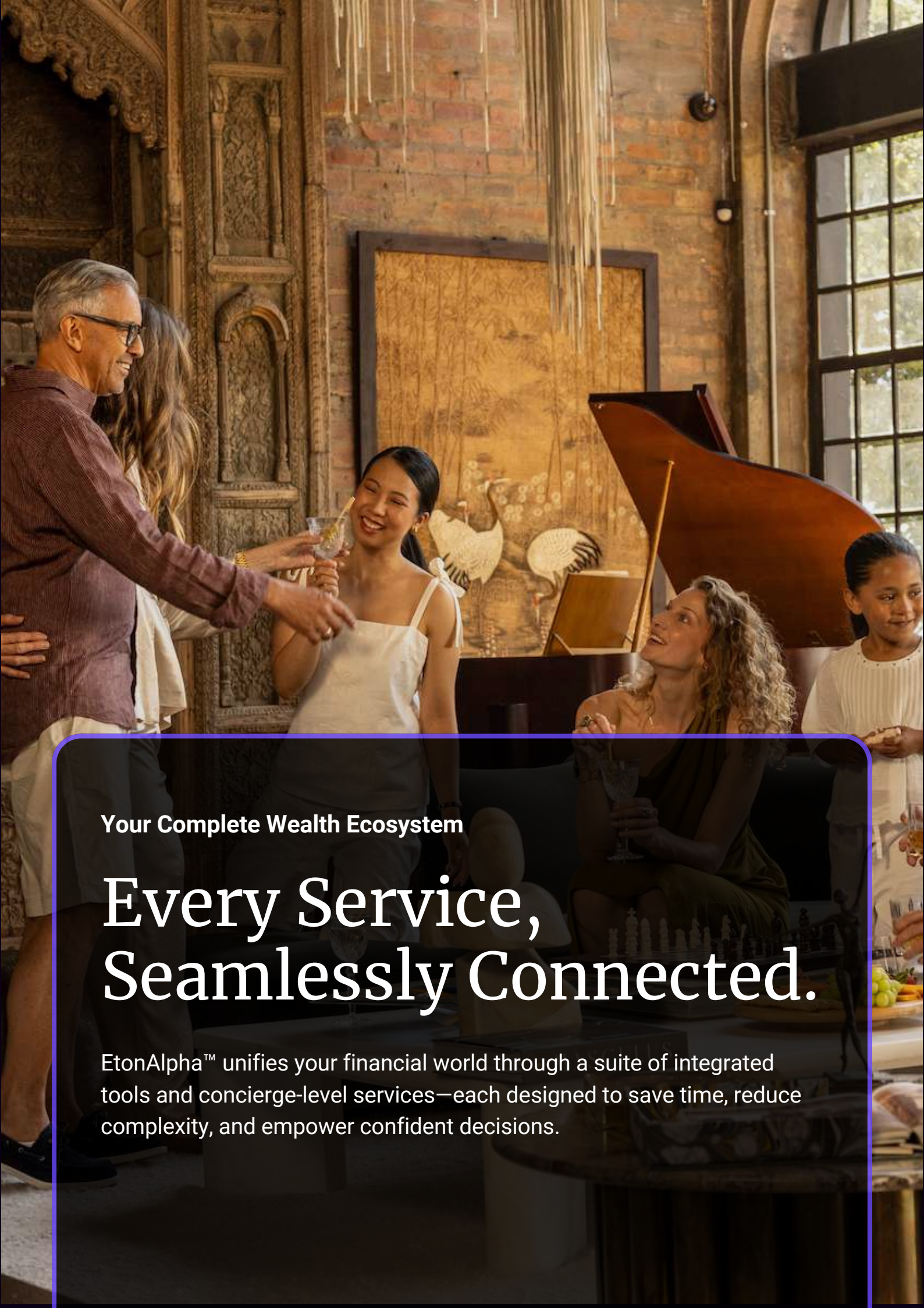
250+ Document Types



Infrastructure and Certifications

ISO 42001, ISO 27001, ISO 27701, SOC 1 Type 2, SOC 2 Type 2

Dedicated private and secure instance. Cloud native architecture.
AI engines - LLM, ML and expert systems. BCP and disaster recovery.
Can be hosted across 54 countries.



Your Complete Wealth Ecosystem

Every Service, Seamlessly Connected.

EtonAlpha™ unifies your financial world through a suite of integrated tools and concierge-level services—each designed to save time, reduce complexity, and empower confident decisions.

EtonAlpha™

Manage your wealth like a Billionaire

Developed for Billionaires. Democratized for \$25M+ Asset Holders.

All Your Global Wealth. One Intelligent Platform.

For the first time, individuals with \$25M–\$500M in assets can access institutional-grade technology — a family office, out of the box.

A New Standard in Wealth Management

Designed for ultra-high-net-worth individuals with \$25M - \$500M AUM

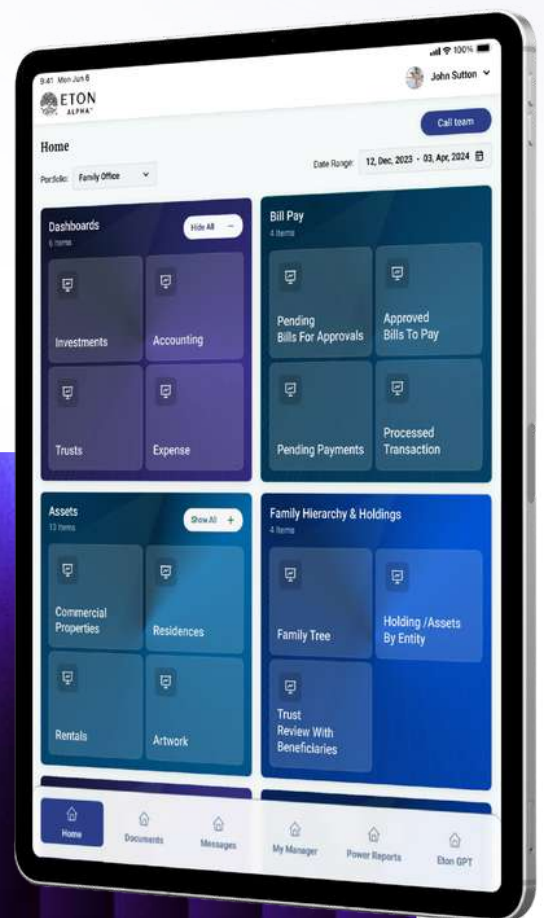
Annual fee of: \$25K–\$125K

Pricing varies based on:

Portfolio complexity | Number of entities & accounts | Geographic jurisdictions | Asset classes & private investments | Selected modules & services

What You Get with EtonAlpha™

- One unified view across all accounts, entities, and investments
- Automated reconciliation across banks and custodians
- Real-time visibility into net worth, liquidity, and performance
- A secure document vault and audit-ready records
- AI-powered insights to drive faster, smarter decisions





Trusted by Leading Families and Advisors

"The Eton team have provided me a consolidated view of all my financial data, across multiple banks, managers and investments. This has given me significant relief from tracking and managing things through multiple different sources. It not only provides me a single-point window to all the information needed for decision-making, but also significant peace of mind and the ability to plan and structure future investments better, with greater financial optimization and succession planning."



Ashok Jain, M.D.

Physician, Entrepreneur, and Founder of KidzCare Paediatrics

"For years, I relied on spreadsheets and fragmented reports to understand my wealth. EtonAlpha™ changed that completely. I now have a single, transparent view across all my entities and investments. It gives me clarity, confidence, and peace of mind. Which, at this stage of life, is invaluable."



Umang Patel

Managing Director & Owner, Vegpro Kenya Limited



ETON
SOLUTIONS

Simplifying the Complex.
Empowering Confident Decisions.



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