



Eton Solutions Launches EtonGPT™, World's First Generative AI Platform for Family Offices

- ***EtonGPT™** is embedded within the AtlasFive® ERP platform*
- *The platform will enable wealth managers to achieve **2 to 4X** increase in operational efficiency*

Bangalore, September 3rd 2024 — Eton Solutions, a leader in comprehensive wealth management ERP systems for family offices has announced the launch of EtonGPT™ the world's first GenAI module for family offices globally. EtonGPT™ integrates the powerful transactional capabilities of Eton Solution's ERP platform, with sophisticated conversational AI functionalities.

Eton Solutions will enable the majority of the 750 families on AtlasFive® to benefit from EtonGPT™. It will be available exclusively to AtlasFive® users to enhance the productivity of their family offices.

EtonGPT™ will improve family office operations by seamlessly integrating data stored in documents with transaction data on AtlasFive®, thereby helping streamline processes and lead to a boost in productivity. Several of Eton Solutions clients, including Shade Tree Advisors (US), Todd Family Office (New Zealand) and Aglaia Family Office (Singapore) have been using this new AI enabled platform. It will allow them to access information and conduct in-depth analyses of their investment and asset portfolios. EtonGPT™ doubles up as both an internal search and data extraction tool within the secure centralized database of the cloud-native AtlasFive® ERP platform.

Backed by pending patents, this hybrid AI platform marries the best features of various AI technologies. It incorporates machine learning, expert systems-based business rule engines, and large language models to deliver unparalleled accuracy and insights. It leverages AI-driven data extraction, summarization, generation, inferencing, and transformation to help family offices operate more efficiently and securely.

Satyen Patel, Eton Solutions' executive chairman said, "Our AtlasFive® solution was the first to offer a centralized data platform that had integrated structured data processing across accounting, investment and tax functions. With the launch of



EtonGPT™, the world's first family office LLM, we are embracing cutting-edge technology and reshaping the future of family office management across the globe. AI is increasingly being deployed across businesses. While family offices have largely remained rooted in manual processes, with the integration of AI, they will undergo an unparalleled change, making them resilient and future-ready”

“With EtonGPT™, AtlasFive® can now parse and integrate data buried in more than 250 document types such as trust plans, estate plans and partnership agreements. This combination of structured and unstructured data processing offers wealth managers the ability to gain a 2 to 4X increase in operational efficiency.”

“EtonGPT™ will offer a foundational shift platform enabling family offices to elevate their legacy, strengthen corporate governance, and provide high value to the HNWIs and UHNWIs they serve.”

Timothy C. Macherone, Chief Operating Officer of Shade Tree Advisors LLC, said, “I do not doubt that EtonGPT™ can be a potential game-changer. In deploying the AI-based technology, which involved leveraging EtonGPT™ to automate our document organization and retention processes, we reduced human involvement by 50% and met our accuracy goals. Similarly, we see countless opportunities to unlock efficiencies in our legacy processes through the use of EtonGPT™ in many verticals, including calculating and posting mark-to-markets on private investments, logging invoice information, and summarizing estate planning documents.”

Andrew Hull, Chief Executive of Todd Family Office, said, “AI is reshaping how we do everything at the Todd Family Office, and our partnership with Eton Solutions has been beneficial. We have faced challenges in fixing AI hallucinations and are worried about the potential misuse of these tech marvels. We're working with Eton Solutions to pioneer a Responsible AI framework that harnesses the full power of AI with transparency, ethics, and trust at its core. Together, we're setting the standard for the future of AI for family offices.”

Stephen Hunt, Chief Executive Officer of Aglaia Family Office Pte. Ltd., said, “Aglaia Family Office is proud to be pioneering the setup of automated and AI-powered consolidated portfolio reporting and analytics solutions in Asia. Our commitment goes beyond just automation—we're focused on the responsible use of AI, ensuring that its integration into our operations enhances not only efficiency but also strengthens



timeliness and accuracy. EtonGPT's early success reassures us that, with Eton Solutions, we're on the right path."

As AI's power is increasingly integrated into modern organizations, Eton Solutions recognizes cybersecurity challenges from traditional threats such as phishing, malware, and data breaches are expanding to include AI-based risks such as deepfakes, misuse, and algorithmic bias. To lessen or mitigate these risks, Eton Solutions is working with its Customer Advisory Board to introduce frameworks that encompass ethics, safety, transparency, trust, and security.

EtonGPT™ is designed to ensure a robust, secure, and ethical environment for family office operations.

About Eton Solutions:

Eton Solutions is an ERP software product (AtlasFive®) and services company founded to handle the complexities of servicing ultra-high-net-worth families globally. The company is based in the United States, in Research Triangle Park, NC. with its international headquarters in Singapore focused on serving markets outside of the Americas. Created by family office leaders, Eton Solutions' flagship product is AtlasFive®, families manage over US\$936 billion on our integrated platform that holistically aggregates and manages all your liquid and alternative investment assets and office's data, reporting and workflow processes. With one source of truth, Eton Solutions leads family offices into the future by maximising efficiency and minimising errors and risk. Eton Solutions has experienced a CAGR of over 100% since its inception.

Visit: <https://www.eton-solutions.com>

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