

# ALTOO

The Altoo Wealth Platform empowers you with:

## VISUAL CONSOLIDATION

of everything you own and owe



### Bankable assets



categorised with detailed portfolio performance, fee benchmarking, and comparison options



### Non-bankable assets



with income and expense breakdowns for rental properties, collectibles, and more with relevant files attached



### Liabilities



including PE and VC capital commitments, mortgages, and loans, logically linked to holdings

## INTELLIGENT ALERTS

to ease monitoring

### Deviations

from baseline portfolio allocation targets you set for currencies, countries, sectors, and more

### Changes

in markets, gains/losses for individual assets, and risk levels according to custom criteria

### Opportunities

to invest in watchlisted equities, individually or in groups, that meet your market criteria

## DATA SECURED

in a digital lockbox

### Encryption

according to the highest standards, with data hosted and managed exclusively in Switzerland

### Customizable privileges

for family members, advisors, and other stakeholders based on the principle of need-to-know

### One-stop messaging

in a digital environment requiring up to three-factor authentication for access

# AUTOMATED ANALYSIS

to reveal insights



## Past decisions

with full visibility of initial amounts invested, benchmarked performance, and expenses for each asset



## Current positions

across all your portfolios to identify investments worth keeping or exiting



## Upcoming moves

manageable with future cash flows, unrealised gains, and liquidity requirements all visible in one place

# DATA MASTERED

with no error and effort



## Transaction records

from 3500+ custodial and non-custodial institutions imported, converted, formatted, and reconciled



## Performance histories

of 40+ types of bankable and non-bankable assets, with the ability to attach digital documentation to each one



## Enrichment

of private equity data for detailed analysis according to custom criteria

# VALUE UNLOCKED

fast with full support

## Bureaucracy handled

on your behalf to get institutional accounts connected

## Data operationalised

with cleansing and validation, even with non-automated sources

## Recommendations

given in your preferred language whenever necessary