



MASTTRO

The Standard in Global Wealth Technology

September 2020

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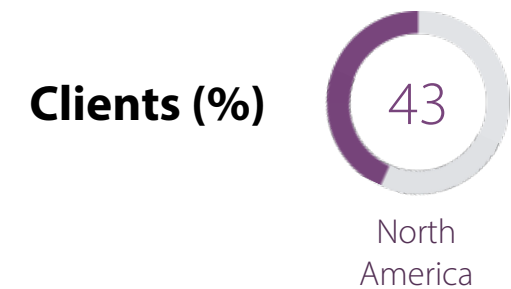
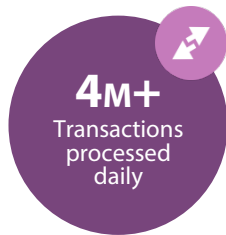
The global wealth technology platform that delivers control and transparency through powerful and intuitive digital experiences.

The world has been changing at a rapid pace, and with it the increasing complexity of managing wealth. For years, wealth managers have been forced to rely on outdated legacy software that fails to deliver, in turn making it difficult for them to scale and win. As clients become more conscious and their expectations rapidly grow, real-time information, speed and clarity are an obligation in order to build lasting relationships.

Mastro was born over a decade ago with the mission to bring control and transparency back in the wealth managers' hands to help them build better relationships. Today we empower hundreds of clients and serve thousands of wealth owners through single family offices, independent advisors, private banks and institutional clients.

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Mastro is a global wealth technology platform delivering the most comprehensive and interactive views of total net worth to wealth owners and their advisors. The platform empowers thousands of wealth owners through its client relationships and partnerships with single family offices, multi-family offices, private banks, financial services institutions and other institutional clients. Over the past decade, Mastro's global client footprint has grown to span more than 24 countries with offices in North America, Europe and Latin America.





Holistic View of Net Worth

All assets across custodians, vehicles, geographies and currencies.



24/7 Monitoring & Alerting

Alerts on portfolio changes, user activity, cash movements and more.



Document Management

Access and manage any document through digital vaults.



Portfolio analytics & Reporting

Analytics and detailed reporting on every aspect of net worth.



Family Communication Portal

Share sensitive information, reports and content in real time.



White Glove Onboarding & Service

Simplified and expedited implementation.



Alternatives & Passion Assets

PE, VC, real estate, art & collectibles, direct investments.



Accounting, Tax & General Ledger

Balance sheets, income statements through automated journal entries.



AI Powered Automation

AI & machine learning automate processing of documentation.



Global Financial Aggregation

Automated direct feeds to any custodian you work with.



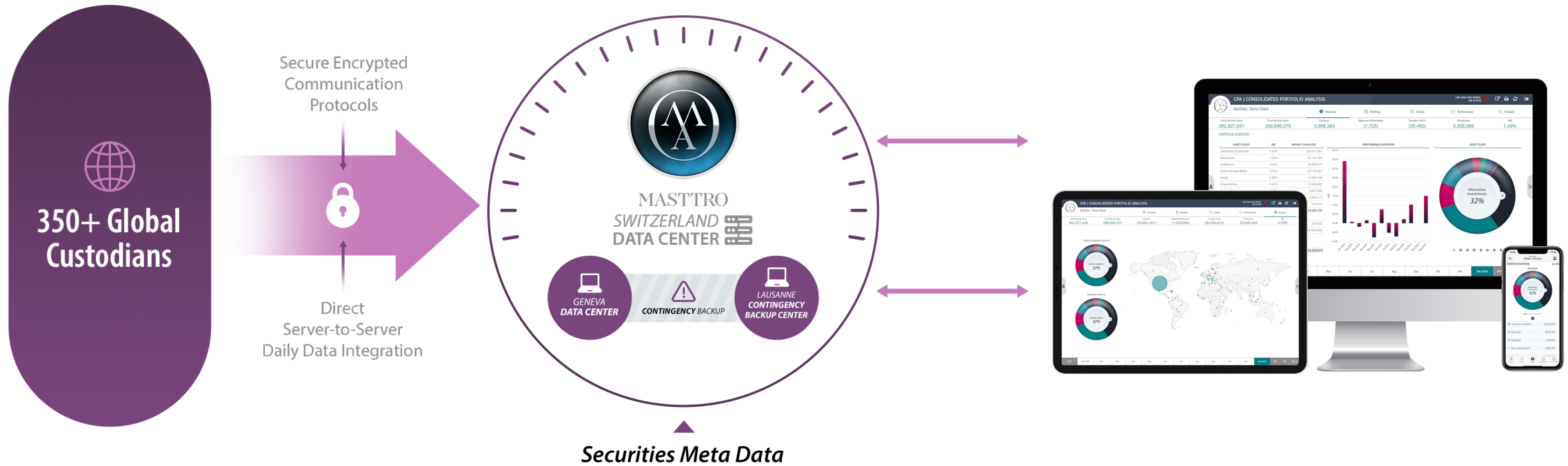
Estate & Trust Management

Interactive views of your estate for optimized succession planning.

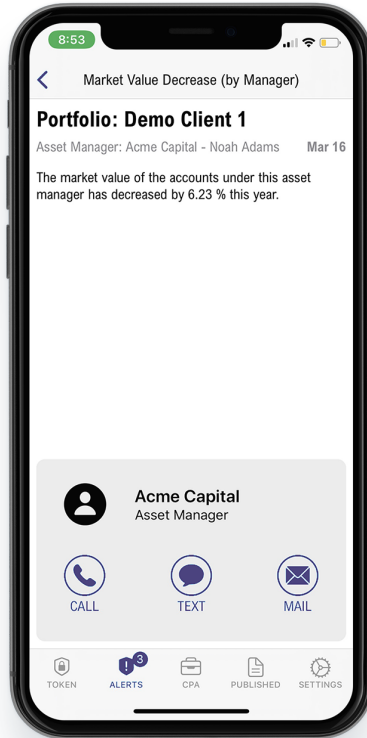


Military Grade Security

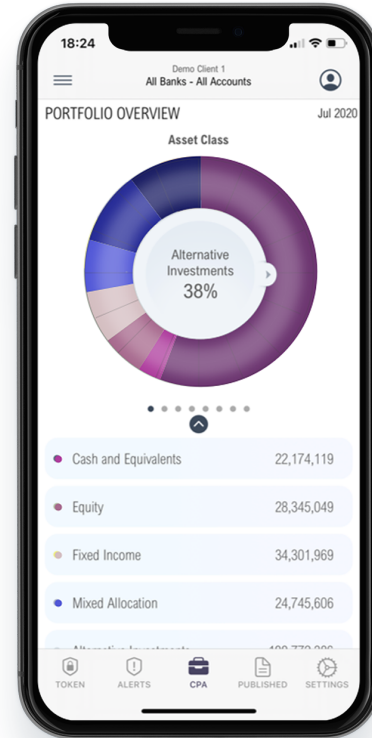
Private cloud. Encrypted data. Clients control data access.



- Average integration of 14 new Custodians per month
- Leveraging Artificial Intelligence technology to process data
- Multi-currency capabilities delivered to global client base



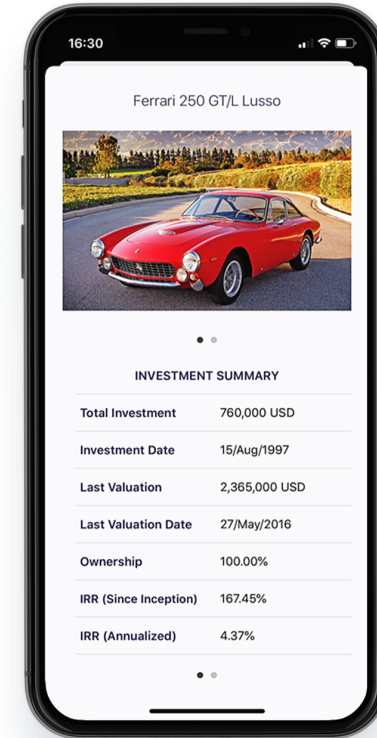
Customized alerts



Full navigation capabilities via mobile



Custom reports & publications



Passion assets at your fingertips

Customized Presentations & Automated Reporting



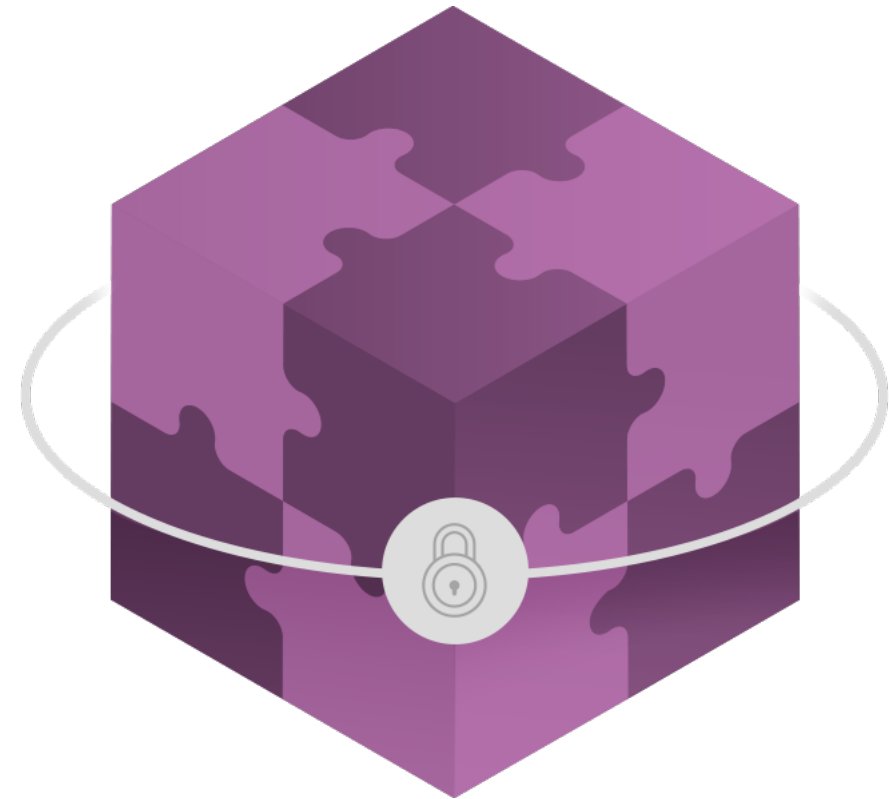
Interactive & Mobile

Masttro's data security infrastructure ensures the safety and confidentiality of client data

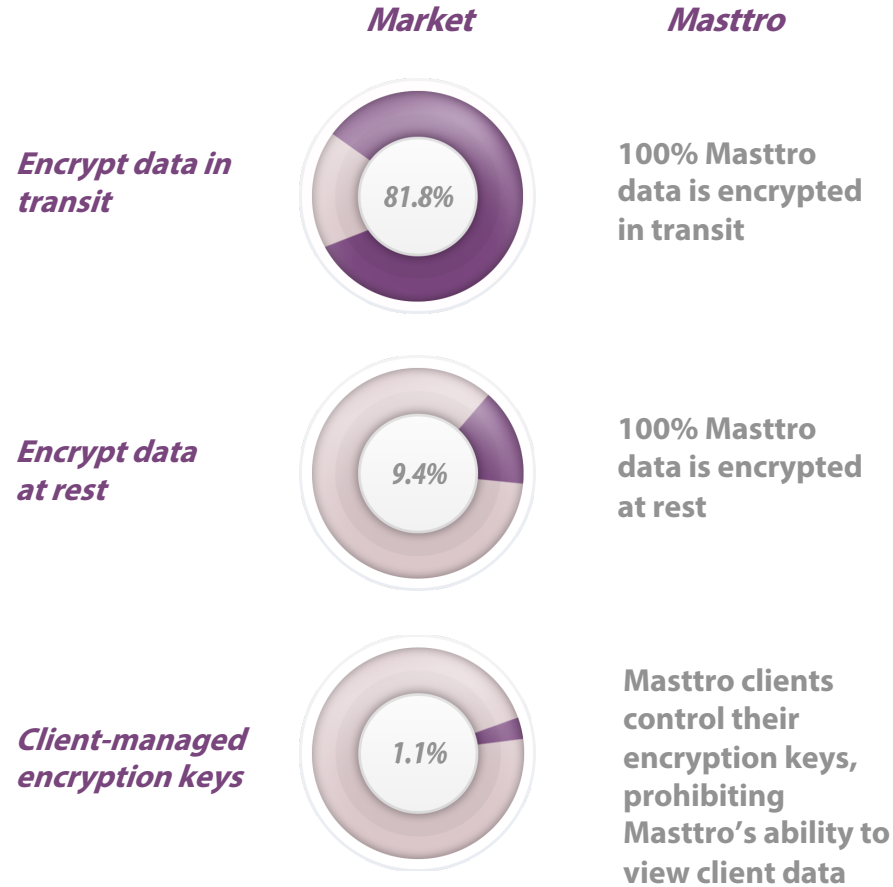
- Masttro is unable to view or access client data intentionally by design; the privacy of our clients is at the core the platform's foundation
- Military-grade protocols keep client data encrypted
- Data stored in dedicated Tier 4 security data center in Switzerland
- Two-level encryption
- Multi-factor authentication for platform access

Stringent Data Center Security Model Enforced

Site Security	▶ Setbacks, Redundant Utilities, Landscaping, Buffer Zones, Crash Barriers, Entry Points, etc.
Physical Security	▶ Surveillance, Mantraps, Two/Three factor Authentication, Security Zones, ISO 27001 27002, etc.
Network Security	▶ Firewalls, Anti-Virus, Intrusion Prevention / Detection Authentication, etc.
Data Security	▶ Encryption, Password Policy, Security IDs, Data Protection (ISO 17799), Data Masking, Data Retention, etc.



Encryption controls vary widely among providers:



Mastro Security Features:

- ✓ Multi-factor authentication
- ✓ Client owns encryption key to their data
- ✓ Private cloud architecture with dedicated servers
- ✓ No data stored in any device
- ✓ Military-grade encryption protocols
- ✓ Data storage in dedicated Tier 4 data centers
- ✓ Secure communication portal in place of unsecure emails
- ✓ Digital Document Vaults

2019



Mastro wins the best **Client Reporting Solution** and **Cyber Security** award at the WealthBriefing **European Awards 2019**

2019



Mastro is **nominated** for **Innovative Client Solution** and **Cyber Security** in the **Family Wealth Report Awards 2019**

2018



Mastro wins the **Innovative Client Solution** award at the WealthBriefing **European Awards 2018**

2018



Private Asset Management Awards

Mastro is awarded the **Highly Commended** designation for **Best Reporting Solution / Innovation 2018** in the Private Asset Management (PAM) awards

2017



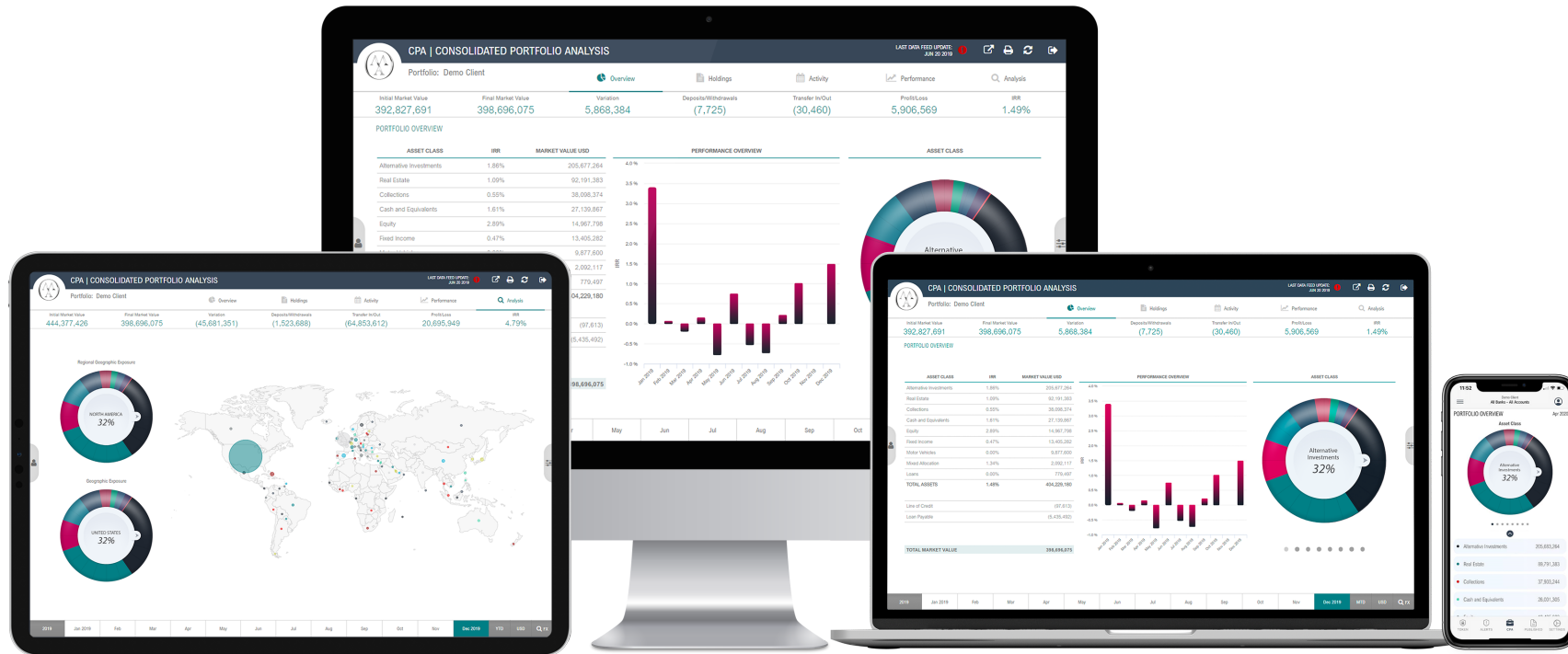
Mastro wins the **Innovative Client Solution** award at the WealthBriefing **Swiss Awards 2017**

2017



Private Asset Management Awards

Mastro wins the **Best Reporting Solution / Innovation 2017** award at the Private Asset Management (PAM) awards



**For more information contact us at:
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