



Masttro is a global wealth technology platform delivering the most comprehensive and interactive views of total net worth. Our platform provides an intuitive, highly-customizable client experience and automated, robust operational efficiencies. Given our deep heritage in the global Family Office business, Masttro's mission is to bring ultimate control, transparency and peace of mind to wealth owners and their family enterprise.

**Holistic View of Net Worth**

All liquid, illiquid and real assets across custodians, geographies, currencies & ownership structures.

**Portfolio Analytics & Reporting**

Comprehensive suite of analytics and detailed reporting on every aspect of net worth.

**Alternatives & Passion Assets**

- Private Equity
- Real Estate
- Insurance
- Hedge Funds
- Vehicles
- Art
- Venture Capital
- Foundations
- Collectibles

**Global Financial Aggregation**

Hands free, fully automated data aggregation & reconciliation with direct feeds to any custodian, bank or broker you work with around the world.

**24/7 Monitoring & Alerting**

Tracks and alerts portfolio changes, cash movements, user activity, document expirations, and more.

**Family Communication Portal**

Secure communication portal for family and their teams to share sensitive information, reports, documents and content in real time.

**Accounting & General Ledger**

Generate balance sheets and income statements at every asset level through automated detailed journal entries. Easily Integrate with any accounting software.

**Estate & Trust Management**

Interactive and detailed views of your estate for optimized succession planning.

**Document Management**

Access and manage any document through digital vaults for secure storage and organization.

**White-Glove Onboarding & Service**

White-glove onboarding service offers simplified and expedited implementation. Efficient data migration including uploads of large data sets.

**AI Powered Automation**

Integrated AI and machine learning advancements automate processing of Alternatives' and other documentation.

**Military-Grade Security**

Award-winning cybersecurity. Private cloud. Encrypted data. Tier 4 Swiss – based data center. Clients control data access and visibility.

For more information contact us at:
www.masttro.com
inquiries@masttro.com

Zurich | New York | Mexico City | Santiago, Chile