



The Platform That is Revolutionizing Wealth Management

How It All Began

In 2009, Rob Mallernee founded Eton Advisors, a highly-successful multi-family office. He immediately saw the challenges and shortfalls of wealth management technology.

He identified the issues that plagued family office firms, such as disconnected data models, insufficient security and the time-consuming effort required for operational management of the family office.

Convinced he knew a better way, he and his team slowly built a new and improved technology foundation for family offices. In 2015, the solution that will change the wealth management world was launched as AtlasFive. This platform is the foundation of Eton Solutions which was created in 2016.

Company Data



Industry leading platform, Azure based infrastructure & security



Implementation & Support
40 People



Services
26 People



IT/Engineering
25 People



Research & Development
20 People



Management;
Sales & Marketing;
Admin
20 People



Market Acceptance

ETON Advisors MFO uses the platform for clients

As a start-up company, won our initial RFP opportunity, a broad industry-wide RFP for a very large single family office conducted by a major consultancy firm.

Attracted initial clients through client referrals, with no formal marketing

A Big 4 accounting firm as a client and first international client

One of the largest SFOs in the world, one of the Top 5 investment banks and more than \$300B of assets tracked on the platform

Platform Evolution

2009

Rob Mallernee opens ETON Advisors. Evaluation of the market for suitable technology to operate the business finds many problems

2010

A core element of the platform, a Single-Entity-Based Data Model, designed and built

2011

Investment Performance and Reporting module goes-live

2012
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2014

Broadened functionality of the system, industry expert evaluation

2015

Veteran software development team is hired

2016

Eton Solutions is launched as stand-alone firm helmed by an experienced management team

2017

Driven by client requests, platform functionality is enhanced.

2018

Launch of Global Tech Center, implementation and client services initiatives

2019

Rebranding of platform to AtlasFive and significant platform upgrades

2020

Significant enhancement around platform technological and operational infrastructure, platform capabilities and multi-dimensional bank level security