



Current Features



Comprehensive Asset Tracking and Stakeholder Mapping



With over 6,000 connected financial institutions, use a single dashboard to manage all your assets and liabilities in real-time. From holding companies to trusts and family foundations. Utilize the task manager to collaborate with other stakeholders

Robust Document Security



Bank level security to ensure data privacy. Including 256-bit encryption, multi-factor authentication, SOC 2 compliance and more

Advanced AI integration for smarter financial decisions



Review estate documents, highlighting missing clauses and explains complex language, while offering trend analysis and personalized insights

Valuation tool



A comprehensive financial analysis tool that provides a valuation of your company

