

Simplify the complexities of wealth with a unified solution

Auria combines essential capabilities into one modern and intuitive experience, redefining how a family's wealth is managed.

Developed for a variety of firms

Wealth managers

Wealth managers focusing on UHNW clients seeking tools that are purpose built to manage complex clients' needs

Family offices

Single family offices still using custom built tools or spreadsheets and seeking a secure, modern experience

Institutions

Multi-family offices and RIAs looking to consolidate multiple tools into one streamlined experience



Auria provides the actionable, datadriven insights essential to achieving clients' goals. Advisors often face the complexity of managing diverse portfolios while ensuring clear decision-making and minimizing risk. Many firms struggle with fragmented data and disconnected systems, leading to inefficiencies and challenges in offering comprehensive wealth management. This fragmented approach can hinder asset integration, obscure the true picture of a family's wealth, and complicate longterm planning.

Auria tech stack

Transformative technology for complex wealth management

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				Barcelona condo 21776405 2000.000					Barce 21778 \$1,700

Wealth Blueprint

Manage and truly visualize all types of assets, including complex trusts and entities using our Wealth Blueprint.

Traditional and alternative assets

Track all assets and liabilities in one place, from public investments, to real estate, collections, loans and private equity.



Holistic family view

Aggregate data from various custodians and data sources and provide families a single view of their wealth.



Robust reporting and client portal Create reports with our flexible and intuitive reporting module and view your total wealth and access reports in a secure, configurable portal.

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	John Smith RA	55,408,400.00					Net Transfers	0.00	
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	John and Susan Primary	\$4750,000-00		U.S. Large Value	217,958	1%	Foreign Taxos Withhold	0.00	
	South Alternative Investments 1079-1144 Scheels	\$2,148,800-00		U.S. Large Growth	5,805,408	27%	Expenses Ending Market Value	100	
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	Susan Smith IBA	5124,090-00		U.S. McGroeth	55,350	0%			
				U.S. Small Value	27,806	05	Growth Chart		
			U.S. Small Blend	31,792	05				

Integrated CRM and document management

Capture client communications, track notes, manage tasks and workflows in our CRM system. Upload and store all your documents and access them in seconds.

