



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

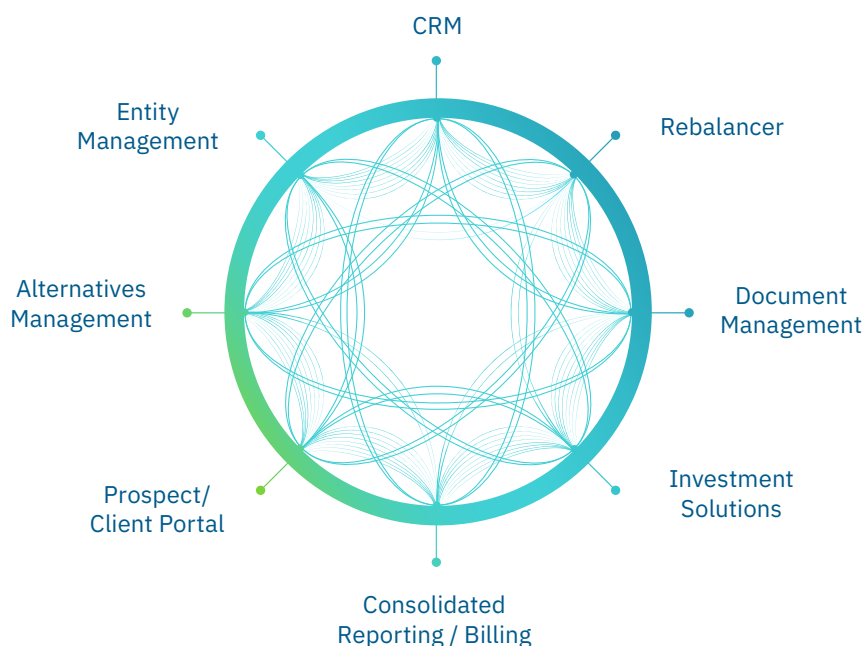
Family offices

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

Institutions

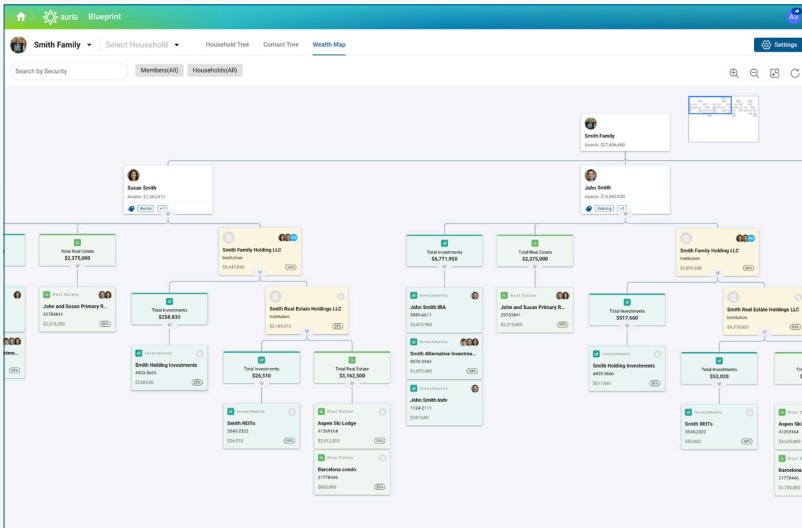
Multi-family offices and RIAs looking to consolidate multiple tools into one streamlined experience

Auria tech stack



Auria provides the actionable, data-driven 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 long-term planning.

Transformative technology for complex wealth management

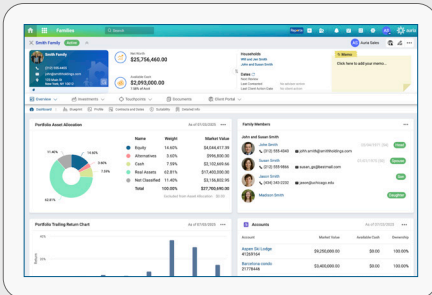


Wealth Blueprint

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.



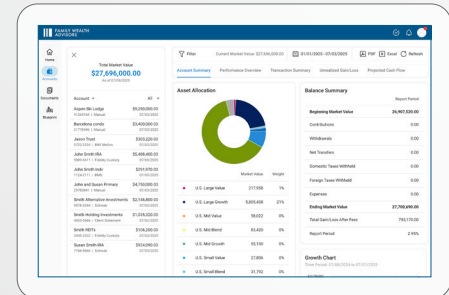
Holistic family view

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.



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.

