

The Altoo Wealth Platform **empowers** you with:

VISUAL CONSOLIDATION

of everything you own and owe



Bankable assets

categorised with detailed portfolio performance, fee benchmarking, and comparison options

Non-bankable assets

with income and expense breakdowns for rental properties, collectibles, and more with relevant files attached

Liabilities

including PE and VC capital commitments, mortgages, and loans, logically linked to holdings

INTELLIGENT ALERTS

to ease monitoring

Deviations

from baseline portfolio allocation targets you set for currencies, countries, sectors, and more

Changes

in markets, gains/losses for individual assets, and risk levels according to custom criteria

Opportunities

to invest in watchlisted equities, individually or in groups, that meet your market criteria

DATA SECURED

in a digital lockbox

Encryption

according to the highest standards, with data hosted and managed exclusively in Switzerland

Customisable privileges

for family members, advisors, and other stakeholders based on the principle of need-to-know

One-stop messaging

in a digital environment requiring up to three-factor authentication for access

AUTOMATED ANALYSIS

to reveal insights



Past decisions

with full visibility of initial amounts invested, benchmarked performance, and expenses for each asset



Current positions

across all your portfolios to identify investments worth keeping or exiting



Upcoming moves

manageable with future cash flows, unrealised gains, and liquidity requirements all visible in one place

DATA MASTERED

with no error or effort



Transaction records

from 3500+ custodial and non-custodial institutions imported, converted, formatted, and reconciled



Performance histories

of 40+ types of bankable and non-bankable assets, with the ability to attach digital documentation to each one



Enrichment

of private equity data for detailed analysis according to custom criteria

VALUE UNLOCKED

fast with full support

Bureaucracy handled

on your behalf to get institutional accounts connected

Data operationalised

with cleansing and validation, even with non-automated sources

Recommendations

given in your preferred language whenever necessary