

Company Name: ADDEPAR, INC.

Software Name: ADDEPAR

Company Website: <https://addepar.com/>

Type of Software: Wealth Management

Description: An American wealth management platform for registered investment advisors, specializing in data aggregation, analytics, and portfolio reporting.

Company Established: 2009

Locations:

- [Mountain View]
 - Phone: +1 855 464 6268
 - Address: 787 Castro St. Mountain View, CA 94041
- [New York]
 - Address: 335 Madison Ave, 25th floor, New York, NY 1001
- [Chicago]
 - Address: 167 N Green Street, Chicago IL 60607
- [Salt Lake City]
 - Address: 460 West 50 North, Suite 125 Salt Lake City, UT 84101
- [Dublin]
 - Address: 10 Ely Place, Dublin 2 D02 HR98
- [Edinburgh]
 - Address: 80 George Street Office, 01-101, Edinburgh, EH2 3BU
- [London]
 - Address: 23 Bedford Square (1st Floor) London, WC1B 3HH
- [Pune]
 - Address: 10th Floor, Fountainhead Tower 1, Viman Nagar, Pune 411014

No. of Employees: 501 - 1,000

Internal Professional Services: No

Business Areas: Data Aggregation, Analytics, Portfolio Reporting

Modules: Addepar

Financial Services Client Types: Wealth Management, Family Offices, Broker Dealers

Cloud: Cloud Based

Additional Information: Addepar software facilitates both visualizing an investment portfolio's exposures at the individual asset class and also tabulating the portfolio's total value according to real-time value of the assets under management. In September 2016, Salesforce.com announced their partnership with Addepar for Salesforce's Wave Financial Services Cloud for financial advisers, making it easier to see across asset classes and produce a single visual for their clients.