

Eton Solutions Secures USD 58M Series C to Bring AI-Driven Wealth Management Technology to the World's Leading Family Offices, PEs and Funds

Category: Business

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[Eton Solutions](#), the wealth management platform that the world's wealthiest single and multi-family offices rely on to manage over \$1 trillion in assets, today announced the finalization of its \$58 Million Series C round, which unfolded in two tranches. The raise was led by repeat investor [Navis Capital Partners](#), a leading private equity firm focused on companies in high-growth markets with an edge in their industries.



L-R:Rajendra Pai, Partner, Navis Capital Partners, Robert Mallernee, CEO, Bryan Henning, SVP, Head of Global Business Development & Satyen Patel, Executive Chairman, Eton Solutions

The funding comes as Eton Solutions experiences rapid growth. In the past three years, the company has more than quadrupled its revenue and expanded its client base by 340% across 15 countries. The company's AtlasFive platform has become the system of record for elite wealth management and is already in use by more than 800 of the world's wealthiest families. The company has made significant investments in artificial intelligence and expanded features to arrive at a holistic solution that's now responsible for managing 130,000 entities, overseeing 205,000+ investments, \$65 billion in annual bill payments, and processing more than 14 million annual transactions. It's upon this data-rich foundation that Eton Solutions has developed more than 400 AI use cases.

The company will use the funding to fuel product innovation and AI development of its AtlasFive platform and expand its suite of products targeting the PE and Funds industry. Built on Eton Solutions' decades of wealth management and financial domain expertise, its forthcoming products will serve a broader range of ultra-high net-worth levels, beginning with

individuals with \$25 million or more in assets. They will also serve a steadily expanding client base for the company, now consisting of Single and Multi-Family Offices, Private Equity firms, Funds, Registered Investment Advisors, Accounting firms, Business Managers and Global Private Banks.

The growth of family offices in the U.S., UK, Switzerland, APAC and the UAE

In recent years, the growth of ultra-high-net-worth families and individuals has resulted in a significant expansion of family offices globally. According to [Deloitte](#), the number of single-family offices worldwide hit 9,030 last year and will reach 10,720 by 2030.

While North America currently has the largest number of family offices, Asia Pacific is expected to outpace it in terms of growth speed by 2030. Eton Solutions, with a U.S. headquarters in North Carolina and international headquarters in Singapore, has a substantial presence in North America, Asia Pacific, Europe and the Middle East. It is well positioned-both physically and strategically-to cater to this growth and the resulting demand.

*"Our total addressable market is increasing every year, and our technology is expanding to meet it," said **Satyen Patel, Executive Chairman at Eton Solutions.** "We've built an ecosystem that is uniquely able to meet every wealth management need-and has the security, privacy, workflow and data foundation necessary to do so-all in one place. Our focus as we enter our second decade is reimagining how wealth managers across the board manage liquid and alternative investments for their clients-whether one or many. This investment will let us super charge our expansion to meet the growing markets and their demand for AI-driven efficiencies that create even more value."*

Over the last ten years, the company has invested \$50 million in the development of its core and upcoming product releases.

This year, it hosted its first ever global client summit, attracting 75 representatives from more than 40 family offices from around the world. The company has 425 employees.

Navis Capital Partners, which manages over \$5 billion in assets, cited Etons unique position in the market as key to their investment decision. *"Weve witnessed how Etons technology enables family offices to achieve unprecedented efficiency and insight,"* said **Rajendra Pai, Partner at Navis Capital Partners**. *"Their platform has become an essential infrastructure for managing complex wealth at scale. Were excited to continue supporting their growth and innovation."*

Eton Solutions has built a prestigious international client base, including the founders of the world's leading technology companies, hotel groups, oil and energy companies, entertainment groups, investment firms and more. Its all-in-one technology platform seamlessly connects all data, services and stakeholders within single and multi-family offices-replacing and streamlining a workflow previously made up of several disparate point solutions and manual processes. The company's ERP platform is additionally used as a white-labeled solution by Institutional clients who manage complex liquid and alternative investments for their clients.

About Eton Solutions

Eton Solutions is a software and services company founded to handle the complexities of servicing ultra-high-net-worth families. Created by family office leaders, Eton Solutions' flagship product is AtlasFive, an integrated platform with US \$1 trillion in assets under administration on its platform that holistically aggregates and manages all your office's data, reporting, and workflow processes. With one source of truth, Eton Solutions leads family offices into the future by maximizing efficiency and minimizing errors and risk. Eton Solutions has experienced a CAGR of over 100% since its inception.

About Navis Capital Partners

Founded in 1998, Navis manages over US \$5 billion in private equity and private credit capital and focuses on investments primarily in Southeast Asia, and selectively in Australia and New Zealand. Navis contributes both capital and management expertise to well-positioned companies with the objective of directing strategic, operational and financial improvements. Navis has one of the largest private equity professional teams in Asia, comprising more than 60 individuals, supported by more than 30 administrative staff, in seven offices across the region. Since inception, Navis has completed over 90 control transactions, of which over 60 have been exited, and consistent with Navis' investment strategy, the majority of these exits have been to trade buyers.

