



Annise® Launches Unified Wealth Operating System for Investors and Families

Annise delivers family-office-level capabilities to investors and families with increasingly complex portfolios—without the high costs of traditional solutions.

PARK CITY, UT, UNITED STATES, November 18, 2025 /EINPresswire.com/ -- [Annise](#) today announced the launch of its AI-enabled Unified Wealth Operating System (UWOS), delivering family-office-level capabilities to affluent investors and families with increasingly complex portfolios—without the legacy infrastructure, manual burden, or costs of traditional solutions.

As private equity, alternative strategies, concentrated positions, multiple custodians, and layered estate structures continue to grow in number and complexity, investors and their advisors face acute challenges: fragmented data, limited transparency, manual workflows, inefficient aggregation, and the high overhead traditionally required to achieve institutional-grade reporting and governance.

Annise addresses these challenges by offering a single, cloud-native platform that unifies portfolio data, trust and entity administration, document intelligence, performance and risk analytics, and advisor collaboration—at a fraction of the cost and operational burden of legacy family-office systems.

Key highlights include:

Holistic Wealth View: Unifies all dimensions of a family's financial life—banking, brokerage, alternatives, real estate, entities, and trusts—in one secure platform.

AI-Enabled Intelligence: Built-in AI agents automate reconciliation, document management, and data extraction from statements and K-1s, reducing errors and eliminating hours of manual work, while also delivering real-time insights and opportunities across your portfolio.

Modern Analytics & Benchmarking: Intuitive dashboards deliver performance, risk, and benchmarking across managers, advisors, asset classes, and entities—instantly and across multiple views.

Advisor & Manager Performance: Provides clear visibility into manager performance, fees, and

alignment with objectives, enabling more informed, data-driven decisions.

Permissioned, Unified Collaboration: Families own and control their data, granting secure access to advisors, accountants, and trustees in a single, fully permissioned environment.

Unified Document Intelligence: Virtual folders digitize, connect, and make searchable all financial, legal, and trust documents, linking them directly to the entities, accounts, and relationships they represent.

“Families with increasingly complex portfolios don’t need to choose between investing in full-scale family-office infrastructure, settling for generic aggregator tools that lack entity intelligence and workflow controls, or relying on multiple Excel spreadsheets,” said Don Epperson, Co-Founder & CEO of Annise. “With Annise, we’re delivering the best of both worlds—the operational sophistication enjoyed by large single-family offices, packaged in an agile, transparent, cost-appropriate platform for families managing complexity and multiple advisors.”

The launch of Annise comes at a pivotal moment for [wealth management](#). [Alternative assets](#) are reshaping portfolios and driving new layers of complexity, while AI is unlocking unprecedented automation and analytical power. Together, these shifts are redefining expectations for simplicity, transparency, and control—the foundational principles on which Annise is built.

“With rising complexity, expanding alternative allocations, and elevated expectations around transparency and governance, families need a platform designed for their unique structures—not a patchwork of logins and spreadsheets,” said Agustin Fagalde, Co-Founder and Head of Product at Annise. “We built Annise to speak the language of trust entities, family-office governance, direct investments, and multi-advisor ecosystems, giving clients time back through intelligent automation and a platform that’s comprehensive and intuitive.”

About Annise

Annise is a wealth and expense management solution for investors, families, family offices, and their advisors—an AI-enabled Unified Wealth Operating System (UWOS). Seamlessly integrating banking, brokerage (including crypto), alternative assets, trusts, and income/expense management, Annise delivers the sophistication and workflows once accessible only to full-service family offices. It’s where individuals and families graduate to when Quicken, Excel, and fragmented tools no longer suffice. Annise enables a family-office approach to managing wealth—without the overhead of legacy software or the cost of traditional family-office infrastructure. For more information or to access our demo, visit www.annise.io.

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- Annise is a technology platform and does not provide financial, legal, or tax advice.
- Secured by bank-grade encryption, multi-factor authentication, and strict access controls.
- Customers always retain 100% ownership of their data—it is never shared, sold, or monetized.
- Past performance is not indicative of future results. For informational use only. This press release contains forward-looking statements based on current expectations and assumptions. Actual results may differ materially.

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