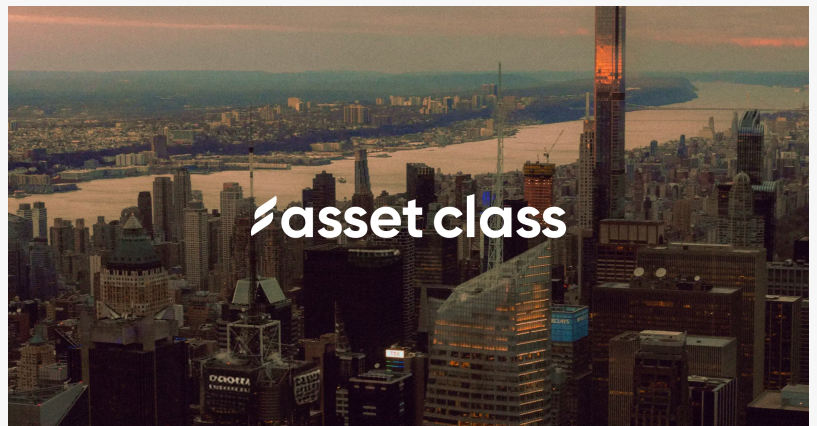


Asset Class Introduces Athena, The AI-Powered Private Capital Platform

Asset Class, the enterprise software platform for private capital, today introduced Athena, the AI-powered platform for Alternative and Private investment firms

NEW YORK, NY, UNITED STATES, July 21, 2026 /EINPresswire.com/ -- [Asset Class](#), the enterprise software platform for private capital, today introduced Athena, the AI-powered platform for Alternative and Private investment firms.



Private capital firms have never had more software, or spent more time maintaining it. Athena is built for a different model: rather than software you operate, it is software that does the work -

“

Athena puts Claude across every function, working from the records your firm already runs on. Each team's agent does the work, drafts, reconciles, and integrates, then a person approves it”

Ferdinand Roberts, CEO & Founder, Asset Class

reading your firm's data, drafting emails, identifying opportunities, preparing reports and more - then stopping at a checkpoint for a member of the team to review and approve. Your people move from doing the work to directing it.

Because Athena runs through the platform rather than sitting beside a single tool, it works from the one set of records the whole firm shares: it drafts each LP's capital-call notice from the allocations, reconciles incoming cash against the fund administrator reports, assembles each LP's quarterly report from live fund data - then queues

each item for a named person to approve before anything reaches an investor.

A persona-based agent for every role

Athena is not a single assistant shared across the firm. Each role is served by its own Claude-powered agent - a persona - tuned to the work that role performs and confined to the data and actions that the user is permitted to access. An 'Analyst' agent and a 'Managing Partner' agent

draw on the same underlying intelligence, but they see different data and take different actions, because each inherits the permissions of the person it works for.

Some examples include:

Business Development - scores and ranks prospects, drafts tailored outreach and follow-ups, and maintains a live, probability-weighted view of the raise.

[Investor Relations](#) - generates capital calls, distribution notices and quarterly LP reporting packs, each drafted and queued for approval before it reaches an investor.

Finance / CFO - validates allocations from the administrator, reconciles fund-admin data, and issues and checks calls and distributions.

Portfolio Management - ingests company self-reporting and unstructured uploads, then extracts, normalizes and merges KPIs for review.

Compliance - helps orchestrate the screening of investors, classifies and files documents, and flags anything expiring or out of policy.

[General Partner](#) - a live command view of every fund: what's raised, what's deployable and where the risk sits, visible in real-time.

There is no separate application to learn. Each agent works inside the screens the team already uses, handling the routine work where it happens.

Human-in-the-loop, by design

Athena is built around a human checkpoint: it senses, drafts, calculates and queues - then waits. The agent reads the relevant records, prepares the output with every figure traceable to its source, and routes it to the right person's queue as a reviewable, editable item; it sends, posts or updates only once a permitted person approves. The decision, the approver and the timestamp are captured for a complete audit trail. Athena is never autonomous and never unsupervised - it does the work, up to the point your team signs off.

Twenty actions, hundreds of jobs

Every task Athena performs is built from a small, reusable set of actions, draft, summarize, extract, reconcile, calculate, screen, report, answer, and others. Roughly twenty of these building blocks combine into the hundreds of jobs a firm runs across every desk; a quarterly reporting pack, an investor onboarding and a fund-admin reconciliation are each a short chain of actions.

Ask anything, cited to source

A partner can ask Athena a question across every fund - "net IRR by vintage," "which LPs are unfunded on the latest call," "dry powder by strategy" - and receive the figure, a chart and a link

to the underlying records in seconds, rather than waiting on a commissioned report. Because every answer cites the record it draws from, any figure can be traced back to source.

Powered by Claude, connected through MCP

Athena is powered by Claude, from Anthropic, and connects to the platform through the Model Context Protocol (MCP), an open standard. Because the intelligence sits within the platform rather than beside it - and connects to the systems a firm already runs, from its CRM and marketing tools to the fund administrator - Asset Class can deliver new workflows, document types and client-specific actions in a fraction of the usual time. Every synced action passes through the same permission and approval controls as everything else.

Enterprise-grade security, and your data stays yours

Athena inherits the mature security model of the enterprise-grade CRM it is built on - object- and field-level security, sharing rules and role hierarchy - so each user's agent can see and act only on what that person could. Asset Class integrates Claude through Anthropic's commercial API; under those commercial terms, the inputs and outputs a firm sends through the API are not used to train or improve Anthropic's foundation models. Least-privilege access per persona, encryption in transit and at rest, a named-human approval gate and a complete audit trail of every action, approver and timestamp make Athena a system firms can trust.

What sets Athena apart

Most AI tools are a chatbot attached to a single product. Athena is the inverse: AI across the whole platform, a role-specific agent per persona scoped to each user's permissions, and a human approval checkpoint on every action - all on the enterprise-grade CRM foundation a firm's IT team already trusts.

"Athena puts Claude across every function, working from the records your firm already runs on. Each team's agent does the work, drafts, reconciles, and integrates, then a person approves it" - Ferdinand Roberts, CEO & Founder, Asset Class

About Asset Class

Asset Class is an enterprise software platform for private capital, with offices in New York, Sydney, Dublin and London. Built on enterprise-grade CRM infrastructure, the platform spans investor CRM, the investor portal, investor communications, onboarding and fundraising, data rooms, fund management, reporting and analytics, portfolio KPI tracking, compliance and mobile - serving private equity, venture capital, private credit, real estate, family offices, RIAs and wealth managers.

Learn more at assetclass.ai.

Media contact: Sam Roberts | press@assetclass.ai

Sam Roberts
Asset Class

+1 332-223-4010

[email us here](#)

Visit us on social media:

[LinkedIn](#)

This press release can be viewed online at: <https://www.einpresswire.com/article/928247674>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2026 Newsmatics Inc. All Right Reserved.