Legacy Software Launches Integrated Intelligence Platform for Investment Research and Treasury Management

New software equips family offices, institutional money managers, and business owners with advanced tools for researching investments and managing capital



Legacy Intelligence

OVERLAND PARK, KS, UNITED STATES, September 9, 2026 /EINPresswire.com/ -- Legacy Software today announced the release of its new financial intelligence platform designed for family offices, institutional money managers, and business owners seeking to strengthen their investment research and treasury management capabilities.

The Legacy Software platform brings investment intelligence, financial research, and treasury management tools together within a unified technology ecosystem. By consolidating these capabilities, the software helps organizations evaluate opportunities more efficiently, monitor financial information, manage risk, and make better-informed decisions about investments and available capital.

“Family offices, investment managers, and business owners are being asked to make increasingly complex financial decisions in an environment where markets and information move at extraordinary speed,” said Eric Fellows, co-founder of Legacy Software. “We built Legacy Software to give decision-makers a more powerful and efficient way to research investments, evaluate risk, and manage capital. Our objective is to put institutional-grade intelligence into one practical platform that helps users make more confident, data-driven decisions.”

Built for Sophisticated Financial Decision-Making

Legacy Software is designed to support three primary user groups:
- Family offices seeking a centralized resource for researching and evaluating investment opportunities.
- Institutional money managers looking to improve the speed, depth, and consistency of their investment research.
- Business owners who want to manage excess cash, liquidity, and corporate investments more strategically.

The platform's integrated capabilities are intended to help users reduce dependence on disconnected research services, spreadsheets, and manual processes. Its centralized structure provides a more efficient way to analyze information and incorporate research into broader investment and treasury management strategies.

Three Core Areas of Intelligence
The new platform brings together three complementary areas:

Investment Research — Tools and analytics designed to help users study public-market opportunities, evaluate companies, identify trends, and assess potential risk and opportunity.

Digital-Asset Research — Structured research capabilities that help users examine cryptocurrencies and digital assets in a rapidly changing marketplace.

Treasury Management — Resources developed to help businesses and other organizations evaluate liquidity, cash allocation, capital preservation, and potential returns on available funds.

Together, these capabilities provide a broader view of an organization's capital—from cash and treasury assets to traditional securities and emerging digital investments.

Turning Financial Data Into Actionable Intelligence
Financial professionals and business leaders now have access to more information than ever before, but the volume and fragmentation of that data can make timely decision-making difficult. Legacy Software was developed to help transform complex financial information into organized, understandable, and actionable intelligence.

The platform is not intended to replace the experience and judgment of investment, legal, tax, or financial professionals. Instead, it gives organizations a technology-driven research environment that can complement their existing decision-making processes and advisory relationships. Legacy Software is now available for demonstrations and enterprise discussions. To learn more, visit LegacySoftware.ai.

About Legacy Software
Legacy Software develops financial intelligence technology for family offices, institutional money managers, and business owners. Its integrated platform combines investment research, digital-

asset intelligence, and treasury management capabilities to help organizations research opportunities, evaluate risk, and make more informed decisions about the management and deployment of capital. For more information, visit https://www.LegacySoftware.ai.

Disclaimer: Legacy Software provides technology, research, analytical tools, and educational information. It does not provide individualized investment, legal, accounting, or tax advice. Investing involves risk, including the possible loss of principal. Users should consult their qualified professional advisors before making financial or investment decisions.

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