Asset Vantage Appoints Nicole Eberhardt as Global Chief Executive Officer

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Asset Vantage, an AI-led wealth-tech SaaS platform built by a family office for family offices and part of the UNIDEL Group, today announced the appointment of Nicole Eberhardt as its Global Chief Executive Officer, effective August 1, 2026. Nicole, who previously served as Asset Vantage's Managing Director, North America, will lead the company's next phase of global growth, product innovation, and market expansion.

Nicole Eberhardt, Global Chief Executive Officer, Asset Vantage

Today, Asset Vantage supports more than 400 families across 10 countries, helping manage over USD 400 billion in assets through a unified platform that brings together data aggregation, accounting, portfolio reporting and analytics, and document management. The platform provides family offices and their trusted advisors, including Certified Public Accountants (CPAs) and Multi-Family Offices (MFOs), with a single source of truth across entities, currencies, and asset classes. By bringing together the general ledger and the investments book, it delivers secure, audit-ready data while ensuring clients retain complete ownership and control of their information. In addition, the platform safeguards highly sensitive financial information while supporting the governance needs of modern family offices.

Nicole’s appointment comes as family offices navigate increasing complexity across global investments, governance, reporting and cross-border structures, while artificial intelligence reshapes the future of wealth management. She brings more than 25 years of experience in financial services technology. An accountant by training, Nicole has spent her career building and scaling the accounting and reporting platforms relied upon by family offices, alternative investment managers and their trusted advisors.

Sunil K. Dalal, Founder & Chairman, UNIDEL Group, said, “*Asset Vantage was founded on a simple belief – that family offices deserve technology built around their real-time financial operations needs. As we look to the future, our ambition is to evolve on the back of our deep domain expertise, continuous innovation, and enduring client trust. Nicole embodies these values. She brings the experience, judgement and leadership to guide Asset Vantage through its next phase of growth while remaining true to the principles on which it was built.”*

Nicole Eberhardt, Global Chief Executive Officer, Asset Vantage, said, *“Clients today expect more than technology – they need a trusted partner with stable ownership that helps them navigate increasing complexity with confidence. Our focus will be on continuing investments in a platform that gives clients greater clarity, control and agility as their needs evolve, and helping family offices, complex asset allocators, CPA firms, and MFOs, manage wealth with confidence across generations. I am excited to lead Asset Vantage into its next chapter, continuing to strengthen our capabilities and create long-term value for family offices around the world*.”

Originally developed to manage the family office of UNIDEL’s founder, Asset Vantage remains one of the few platforms built on a native general ledger architecture rather than disconnected reporting systems. By combining accounting and reporting in a single platform, it enables family offices to operate with greater transparency, efficiency, and confidence.

About Asset Vantage

Asset Vantage, a UNIDEL Company, founded in 2011, empowers families and their trusted advisors with integrated solutions that deliver deep insights into investments and enhanced control over their financial legacy. Powered by integrated general ledger capabilities and advanced performance reporting, the platform delivers a complete, real-time view of assets, liabilities, and overall wealth, enabling principals and their trusted advisors to make confident, informed decisions. Today, Asset Vantage supports more than 400 families across 10+ countries and helps oversee more than USD 400 billion in assets.

For more information, visit www.assetvantage.com.