



Unlimited.ai Launches Project Sterling, a Proprietary Portal Retrieval System to Automate Investment Data and Eliminate Manual Logins

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HOUSTON, TX - August 24, 2026 -

Unlimited.ai, the AI-native operating system for family offices, ultra-high-net-worth individuals, and the RIAs who serve them, today announced the release of Sterling, its proprietary Portal Retrieval System engineered to change how clients interact with external investment data. The new technology automates data and document ingestion across disparate fund manager portals, directly underpinning Unlimited.ai's strategic initiative to optimize client operations and dramatically reduce total onboarding time.

In today's private markets landscape, family offices, high-net-worth investors, and their advisors routinely navigate dozens ? sometimes hundreds ? of separate fund manager portals. This fragmented ecosystem forces operations teams to spend countless hours manually logging into various platforms to retrieve essential performance metrics, tax documents, K-1s, capital call notices, and quarterly updates. Beyond the obvious strain on time, this repetitive data fetching creates operational friction, increases the risk of human error, and adds unnecessary opacity to the investment management workflow.

As alternative asset allocations continue to surge across the wealth management landscape, legacy software

infrastructure has increasingly struggled to keep pace with the complex mechanics of non-public holdings. Existing aggregation tools often rely on rigid techniques or delayed third-party data feeds that frequently break, leaving back-office teams stranded with incomplete reporting periods and outdated capital activity data. Sterling directly bridges this gap by offering a modern, resilient architecture tailored specifically to the nuances of private equity, venture capital, real estate, and private debt reporting formats.

Sterling redefines portal integration by introducing seamless, automated retrieval. Instead of managing an overwhelming matrix of credentials, users connect to a portal once, and it runs on autopilot from then on. The system then retrieves, extracts, tags, and saves every document, automatically visualizing the underlying data inside a client's Unlimited.ai reporting dashboards, eliminating the need for ops teams to manually re-enter or reconcile information across sources.

"Integrating disparate investment data has historically required extensive manual work, requiring users to download and reupload the same documents across dozens of providers," said Hunter Honnessy, CTO and Co-Founder of Unlimited.ai. "With Sterling, we've introduced technology that eliminates the manual portal process entirely. By allowing users to log in just once for automated document and data retrieval, Sterling directly drives our objective of providing customers with a seamless, end-to-end management system for their complex portfolios."

Beyond immediate efficiency gains, the infrastructure behind Sterling unlocks a level of operational visibility that was previously unachievable for multi-generational wealth vehicles and high-volume wealth advisory firms. By transforming unstructured PDFs, notice scans, and static reports into structured, actionable intelligence instantly, client teams gain full visibility into cash flows, distributions, and valuation updates as soon as fund managers publish them.

Sterling serves as a central piece of Unlimited.ai's push to compress the onboarding phase that has traditionally slowed software rollouts across the wealth management sector, while also providing users with a system that can continue to update private holdings information in near real time. The company was founded by a team with decades of combined leadership experience managing and allocating billions in private capital, paired with frontier AI engineers, built to solve the complexity problem its founders lived firsthand.

The public launch of Sterling follows overwhelmingly positive customer feedback during initial beta and pre-rollout, reinforcing the company's operational momentum as it continues to advance its core mission: giving family offices and their advisors a single orchestrated, trustworthy system of intelligence for the full arc of their portfolios, from first access to final exit.

“At Unlimited, we never settle for the status quo way of doing things because it’s underserved investors for too long,” said David Sawyer, CEO and Co-Founder. “What our team has built with Sterling is a game changer and brings us one step closer to our mission of fully automating the management of complex portfolios for our clients.”

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Unlimited.ai Inc.

Unlimited.ai is the intelligent operating system for the world’s private capital. The future of family office technology isn’t another dashboard; it’s an end-to-end AI platform that understands your portfolio the way your best people do!

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