



Unlimited.ai Achieves SOC 2 Type II Compliance, Reinforcing Security-First Foundation for AI-Native Private Markets Infrastructure

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Unlimited.ai, the pioneering AI-native investment intelligence platform specifically engineered for family offices and private market investors, today announced the successful completion of its SOC 2 Type II compliance audit. This achievement represents a critical milestone in the company's mission to provide institutional-grade security, unwavering operational integrity, and a responsible framework for AI-driven financial infrastructure. In an era where legacy fintech systems often struggle to adapt to modern cybersecurity threats, this certification reinforces Unlimited.ai's position as a leader in the next generation of financial technology.

The successful completion of this rigorous audit, conducted over an extended observation period, validates the effectiveness of Unlimited.ai's internal controls across the key trust service principles of security, availability, and operational processing. Unlike a Type I audit, which provides a snapshot in time, the SOC 2 Type II designation confirms that Unlimited.ai's security protocols are consistently applied and effective over the long term. As the private markets landscape faces increasing complexity and a heightened threat environment, Unlimited.ai distinguishes itself as one of the few platforms in the alternatives industry built from

the ground up with enterprise-grade governance at its core. This structural advantage allows the platform to offer the agility of AI-native software without compromising the rigid safety standards required by the world's most sophisticated investors.

This certification provides clients with documented assurance that the platform meets the highest industry standards for protecting sensitive data and maintaining system reliability. For family offices managing large and complex asset portfolios, the stakes for data security have never been higher. By achieving SOC 2 Type II compliance, Unlimited.ai offers a transparent and verified alternative to incumbents who may be retrofitting AI onto aging, less secure architectures.

Hunter Honnessy, Co-Founder of Unlimited.ai, stated, "From day one, we designed Unlimited.ai with the clear understanding that private markets infrastructure must meet and exceed the institutional expectations surrounding data protection, operational rigor, and overall system reliability. This SOC 2 Type II achievement is a testament to that early vision and our ongoing dedication to the safety of our clients' most valuable information".

The architecture of Unlimited.ai was meticulously designed from its inception to address the unique operational and security requirements of sophisticated private market investors. This design philosophy ensures that AI is not merely an "add-on" but a secure, core component of the investment workflow. The platform integrates a robust suite of institutional-grade security measures, including customer data isolation, end-to-end data encryption, and granular role-based access controls and oversight. These measures are essential for maintaining the confidentiality of proprietary investment information and sensitive client data.

Furthermore, the platform features auditable operational governance protocols specifically designed to support the secure handling of private financial documents and proprietary data, ensuring that every workflow remains transparent and protected. This is particularly relevant for the automation of complex tasks such as valuation and capital movement tracking, where accuracy and data integrity are non-negotiable. By automating these high-stakes processes within a SOC 2 compliant environment, Unlimited.ai reduces the human operational risks associated with legacy manual reporting.

Looking toward the future, Honnessy noted that AI will inevitably sit at the center of modern investment operations. The transition toward an AI-native private markets system is already underway as firms seek more efficient ways to manage alternatives data and consolidated reporting. He emphasized that this transition requires more than just powerful machine learning models; it requires a structural foundation that investors can trust with their critical financial data and complex operational processes.

Security and governance are more than features. Rather, they form the bedrock of the platform. In a market where brand name rather than technical depth is often seen as winning, Unlimited.ai is setting a new

standard for what a modern, secure fintech stack should look like. The audit was completed in partnership with Vanta, the leading trust management platform used by modern technology companies to automate and monitor compliance programs. This partnership ensures that Unlimited.ai's commitment to security is a continuous, automated process that evolves alongside the threat landscape.

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For more information about Unlimited.ai Inc., contact the company here: [Unlimited.aiDavid Sawyerinfo@unlimited.ai](mailto:DavidSawyerinfo@unlimited.ai) Houston, Texas

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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