

Sandbox

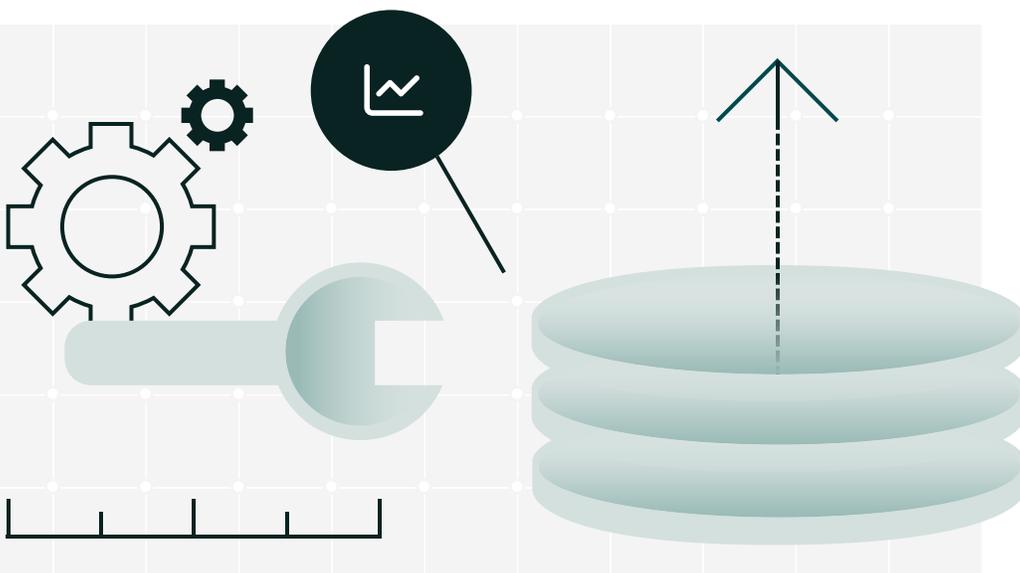
Addepar Sandbox allows you to test drive new workflows and processes in your tech stack with an isolated 1:1 copy of your production environment, bringing in only the production data you need.

Test, explore and build with confidence

Secure workflow testing: Use real client data plus all production features to simulate and refine end-to-end workflows without compromising data configurations or disrupting business. Safely experiment with updating ownership structures and transactions, testing APIs and integrations, exploring various styles in your reporting templates and more.

Seamless new feature exploration: Feel confident in your proficiency with new Addepar features by easily experimenting with them before implementing into production.

Demo and train with confidence: Demo to potential hires, highlight Addepar to executives or onboard and train new employees with a clean copy of your production environment to help prevent unintentional changes.



Get the most out of Sandbox

Whether it's time to try something new or get a fresh start, Sandbox gives you the flexibility to test and explore your ideas the way you want.

| | Premium | Standard |
|---|---|---|
| Accounts | Full production copy, up to 50,000 accounts * (functional limit) | Up to 1,000 accounts* |
| Refreshes Refresh your Sandbox to import the latest data and configurations | 12 refreshes per year | 8 refreshes per year |
| Add Beta Features Explore features or products in beta – add straight to your Sandbox |  |  |
| Pricing | Contact your Addepar team | \$10,000 flat fee |

A project-based Sandbox is also available. If you're interested, contact your Addepar team to learn more.

**Additional accounts might be copied as part of the process to ensure that the in-scope accounts have the associated information to proceed.*

Connect with your Addepar representative to learn more about Sandbox and understand the right solution for you.

Feature descriptions

Here are the key features and products you can expect to see in Sandbox:

| Supported products and features | |
|---------------------------------|--|
| Products | <ul style="list-style-type: none">✓ Analysis✓ Billing✓ Firm Administration✓ Report Generation✓ Help Center✓ In-app Import Tool✓ Audit Log✓ Client Portal |
| Accounts and data | <ul style="list-style-type: none">✓ 1:1 copy of production data, with up to 1,000 accounts with Sandbox standard or 50,000 with premium✓ Excel-based import tool✓ API key integrations✓ Authorization workflow (OAuth) integrations✓ SSO |
| Applications | <ul style="list-style-type: none">✓ Full-access |
| Not supported | |
| Applications | <ul style="list-style-type: none">✗ Navigator✗ AdvisorPeak/Addepar Trading✗ Portfolio Accounting✗ Marketplace |
| Accounts and data | <ul style="list-style-type: none">✗ Daily portfolio data feed updates |