

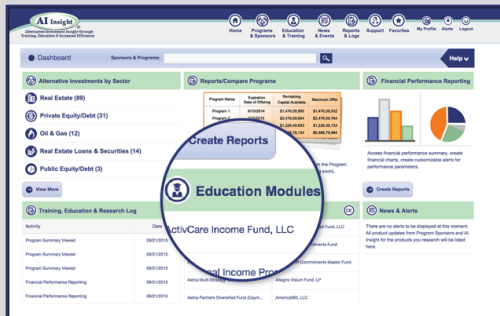


Financial Firm Onboarding & Implementation



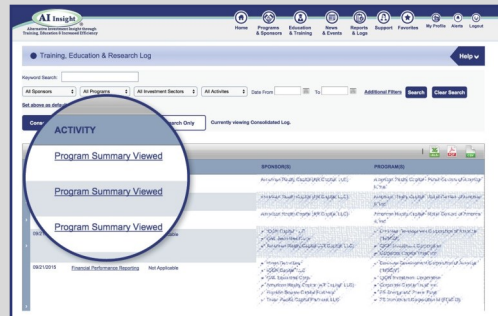
Welcome to AI Insight! To fully implement the AI Insight platform for your firm, we'll provide you with all the support you need. It's time to schedule interactive training sessions that will cover:

Platform Management



- Managing Users
- Sponsor list and contacts
- Adding Selling Agreements
- Customizing Education Modules
- Approving Resources

Supervisory Resources & Reporting



- How to review testing completions
- Training, Education & Research Log
- Site usage reports

Due Diligence, Research & General Education



- How to research products:
- Program Fee & Expense Report
 - Comparative Reporting
 - Financial Performance Reporting
 - Alternative Mutual Fund Research

Thank you for joining AI Insight. We look forward to working with you to provide comprehensive training on Alternative Investments.



Financial Firm Onboarding and Implementation

AI Insight Implementation Checklist

Complete these 10 easy steps prior to launch to make the most of your AI Insight subscription benefits.

- Add administrative users** (Admin > Search All Users > Manage Admin Users tab > Add User button)
- Add all Selling Agreements and set designations** (Admin > Manage Selling Agreements > Add New Selling Agreements)
- Customize all corresponding education modules** (Education & Training > Education Modules)
- Upload firm-specific forms/documents** (Admin > Manage Selling Agreements > Add New Selling Agreements)
- Approve marketing materials** (under Action Items on dashboard)
- Upload firm logo to be added to platform** (Profile > Customize Branding)
- Approve generic client material** (under Action Items on dashboard)
- Approve sponsor events when available** (under Action Items on dashboard)
- Set launch date and training dates for your advisors** (AI Insight will provide training)
- Send Ann Saline a copy of the communication you send to your firm.** (Ann will send a template for your use once implementation is completed.)

Stay In Touch With AI Insight

- **Key Contact:** Ann Saline, Sr. Director, Financial Firm Implementations and Client Services, at 440-494-7424 or asaline@aiinsight.com.
- **Customer Care:** 8:00 a.m. to 6:00 p.m. ET, Monday - Friday, at 877-794-9448 ext. 710 or customercare@aiinsight.com.

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