



Alternative Investment Information, Tools and Alerts at Your Fingertips

Financial Advisors' Guide to AI Insight

Access AI Insight's sophisticated tools to help you demonstrate in-depth alternative investment product and sector knowledge—and more quickly strengthen conversations with clients and prospects.



Research 350+ open and closed alternative investments through AI Insight, including interval funds, real estate, BDCs, private equity, hedge funds, alternative mutual funds, opportunity zone funds and more.

On a subscription basis, AI Insight provides informational resources and training to financial professionals regarding alternative investment products and offerings. AI Insight is not affiliated with any issuer of such investments or associated in any manner with any offer or sale of such investments. The information above does not constitute an offer to sell any securities, or represent an express or implied opinion on or endorsement of any specific alternative investment opportunity, offering or issuer. Copyright ©2020. AI Insight Inc. All rights reserved.

NAVIGATE THE DASHBOARD

Information, tools and alerts at your fingertips.

The screenshot shows the AI Insight dashboard interface. The top navigation bar includes links for Home, Programs & Sponsors, Education & Training, News & Events, Reports & Logs, Support, Favorites, My Profile, Alerts, and Logout. The main content area is divided into several sections:

- Alternative Investments (316):** A list of investment programs with filters for Structure, Sector, and Objective.
- Education Modules:** A table of required and optional tests, including AI Insight Structured Products Payoff, Ann Test X, Cheryl Test 6 28 2016 - A, and IPA Course 1: Fundamentals of Direct...
- Financial Performance Reporting:** A section with a bar chart and a pie chart, providing access to financial performance summary and customizable alerts.
- Compliance Logs:** A table showing test results for ACAP Strategic Fund and Any Broker Dealer Policies & Pro...
- Reports/Compare Programs:** A table comparing four programs based on expiration date, remaining capital, and maximum offer.
- News & Alerts:** A section displaying system alerts for new CE courses and strategies.

Numbered callouts (1-9) highlight specific features: 1. Programs & Sponsors, 2. Education & Training, 3. Favorites, 4. My Profile, 5. Search, 6. Video Tutorial, 7. Compliance Logs, 8. Reports/Compare Programs, and 9. News & Alerts.

1 Programs & Sponsors

View your firm's approved alternative investment programs and sponsor contact details.

2 Education & Training

Access your firm's approved product-specific and CE training modules. Locate additional resources, such as whitepapers, regulatory notices, etc.

3 Favorites

Set up shortcuts for your preferred features to more easily navigate AI Insight.

4 My Profile

Complete and manage your profile details, licenses and professional designations to receive notices on programs and educational opportunities.

5 Education Modules

Find training modules for your firm's approved programs.

6 Financial Performance Reporting

Set up custom email alerts and reports for unbiased monitoring of key performance indicators through the lifecycle of an investment (*a premium feature*).

7 Compliance Logs

All of the training and research you complete on AI Insight is recorded for easy compliance documentation and retrieval.

8 Comparative Reports

Compare two or more programs based on criteria listed in the Program Summary and Corporate Summary.

9 News & Alerts

Receive daily notifications on your firm's approved programs.

ENHANCE PRODUCT KNOWLEDGE

Begin your research on AI Insight in two ways.



Dashboard Sponsors & Programs

Video Tutorial Help

Alternative Investments (316)

Type a program name

Structure Sector Objective Clear

- 1000 South Michigan Preferred LLC
- 361 Global Long/Short Equity
- 73rd Street Partners, LLC
- AB Select US Long/Short Portfolio
- Abbey Capital Futures Strategy

Education Modules

Required Tests	Optional – but required to sell program
AI Insight Structured Products Payoff...	295 BR Holdco DST
Ann Test X	ACA The Chelsea, LLC
Cheryl Test 6 28 2016 - A	ActivCare Income Fund, L C
IPA Course I: Fundamentals of Direct...	AEI Net Lease Portfolio V DST
	Aetna

Financial Performance Reporting

Access financial performance summary, create financial charts, create customizable alerts for

Research a specific product or sponsor by typing in the name and clicking on the magnifying glass.

Perform sector-specific research by selecting a product or using the search bar under "Alternative Investments".

Either search option allows you to easily access product-specific information

Review all of the details about products in the **Program Summary** and sponsors in the **Corporate Summary**.

Access product-specific, prospectus and PPM-based training under **Start Education Modules**. You will find your completed tests logged under **My Compliance Log**.

Perform detailed fee analysis to support your firm's standards with the **Program Fee & Expense Report**.

Choose **Compare to Other Programs** to create powerful product comparisons based on more than 90 different product features, such as offering price, distribution rates or fees.

Select **Search for Sponsor Support**, **Request Offering Materials** and **Send Sponsor Inquiry** when you have requests for wholesalers—saving time and effort.

Download your firm's required forms, recent SEC filings (10Ks, 10Qs, etc.), subscription agreements, brochures and other offering documents under **Forms** and **Download Offering Documents**.

PERFORM PRODUCT-SPECIFIC RESEARCH

Everything you need to conduct research can be found here.

Sponsor Name	Fund, Inc.	Private Equity/Debt	Public	Closed-End Fund	05/09/2013	Continuous offering	\$183,500,000	\$1,500,000,000	Add/View
Program Summary	Start Education Module	Broker Dealer Sponsor Summaries	Download Offering Documents						
Corporate Summary	My Compliance Log	Broker Dealer Program Summaries	Request Offering Materials						
Executive Summary	Compare to Other Programs	Forms	Send Sponsor Inquiry						
Financial Performance Reporting	Search for Sponsor Support								

Attention: If your firm has set up a research or training prerequisite, you will find this under "Education Modules" on your dashboard or by clicking on the "Education & Training" icon at the top, then choosing "Education Modules".

Why AI Insight?

WHY?

In today's regulatory-centric environment, Broker Dealers, RIAs and advisors need confidence to offer complex product lines to remain competitive.

HOW?

Conduct thorough, independent analysis on alternative investment offerings and implement a compliance documentation process.

WHAT?

Presentation of alternative investment offerings in a consistent and transparent manner must be demonstrated to regulators.

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Hours:
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**Our offices follow the same holiday schedule as the NYSE.*



Alternative Investment Insight Through Research,
Training and Increased Efficiency
www.aiinsight.com