



Alternative Investment Insight through
Research, Training and Increased Efficiency

AI Insight is the industry's leading online resource for alternative investment research, training and compliance support for Independent Broker Dealers, RIAs and Financial Advisors.



AI Insight will provide an unbiased presentation of your program facts, features and risks, offering IBDs, RIAs and FAs easy access to your current offering documents including updates to quarterly performance.



The AI Insight platform serves as documented protocol to meet FINRA compliance requirements associated with Alternative Investments.



AI Insight helps Alternative Investment Managers elevate their visibility in the industry, increase program accessibility and promote transparency.

Current Subscribers

- 160 Independent Broker Dealers and RIAs representing more than 50,000 Advisors
- 140 Alternative Investment Management firms

Example Investment Types Available

Alternative Mutual Funds	Hedge Funds	BDCs
Closed-End Interval Funds	Managed Futures	Energy
Opportunity Zone Funds	Private Equity/Debt	REITs
Private Placements	Preferred Securities	1031 Exchanges



Request a live tour and ask about AI Insight subscription options at www.aiinsight.com or call us now at 877-794-9448.

AI Insight created a fast-growing network of independent registered investment advisors, broker dealers and family offices that are expressly interested in alternative investments.

Our contacts become your contacts

- **Leverage our extensive database** for direct access to due diligence officers and financial professionals.
- **Receive real-time leads** and target prospects with click-to-email capabilities from our lead management system.
- **Promote new offerings** through AI Insight's News and Alerts, webinar opportunities, monthly newsletter and listing in *The DI Wire*.

Compare your programs to others in the industry

Premium Reports and email alerts help you compare public and private programs*, including real estate, private equity, closed-end funds, hedge funds, managed futures and 1031 exchanges.

- **Program Fee & Expense Report** lets you review fee categories organized by Offering Phase, Operational Phase and Liquidation Phase.
- **Comparative Reports** help you create custom reports to compare programs based on 120+ product features.
- **Financial Performance Reporting** allows you to monitor performance data for non-traded REITs, BDCs and closed-end funds.

*Public program information is available to all Alternative Investment Managers. No private program information will be available to others unless we have your permission. If you choose to share private information, you will be able to view programs of other private sponsors that choose to share.

Providing education on your offering is easy

- **Deliver quality, regulatory-compliant training** backed by AI Insight's detailed online compliance documentation.
- **Present your offerings** in a consistent and transparent way using AI Insight's unbiased training approach.
- **Customize product training** based on the actual financial firms and advisors who sell your offerings.



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