

AI Insight's Streamlined Alternative Investment Program Review Process

AI Insight's one-click alternative investment due diligence process automatically tracks your progress as you move step by step through program reviews.



- Step 1 Executive Summary: Get a high-level overview of the sponsor and program information.
- **Step 2 Program Summary:** View key data points of the program's offering documents with links to full documents and marketing materials.
- Step 3 Company Summary: Learn about the sponsor, their other closed and open programs, historical capital raise, and any pending litigation.
- Fee & Expense Report: Understand how competitive a program's pricing is relative to their peers.
- Step 5 Comparative Report: Conduct side-by-side analysis of 2 or more programs based on 120+ criteria.
- Step 6 Performance Summary: Review the ongoing and unbiased reporting of a public offering's key financial data and performance.
- Step 7 Industry Report: Keep up with alternative investment trends, historical market data and hard-to-find statistics for each industry and program.
- Step 8 Education Module: Complete sector-specific and program-specific modules to document your understanding of alternative investment programs prior to presenting to clients.

Questions? Contact AI Insight Customer Care at (877) 794-9448 or customercare@aiinsight.com.

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