

Are you recruiting advisors who work with alternative investments?

AI Insight can help you enhance your alts due diligence process

Research

Review independent, unbiased program summaries for hundreds of open and closed alternative investments to understand which programs their clients already own.

Education

Access PPM and prospectus-based education modules on product features, risks and suitability for each program.

Compliance

Automatically documents user activity to demonstrate fulfilling regulatory requirements per SEC's Reg BI, FINRA NTMs 03-71, 05-26, 10-22 and 12-03, and additional guidance related to complex products.

Contact AI Insight to get started:

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Alternative Investment Insight through
Research, Training and Increased Efficiency