

Distributing alternative investments isn't easy, but investing can be.

AIX is making sponsors' lives easier by simplifying the alts investing experience.

AIX and AI Insight have partnered together to offer sponsors an unprecedented edge for simplifying the subscription experience for financial professionals and investors.

AIX is the only enterprise platform that enables authentic straight-through-processing — connecting the entire alternative investment sales process and stakeholders.

DIGITAL SUBSCRIPTION PROCESS

1

ADVISOR

With built-in AI Insight training verification, live forms, data integrations, and eSignature, the subscription process has never been more efficient for advisors.

2

INVESTOR

Investors can quickly review and sign forms from anywhere —allowing for business without in-person meetings, mailing, or faxing.

3

HOME OFFICE

Configurable workflows for operations and compliance allow firms to centralize alts processing to reduce risk, minimize not-in-good-order transactions, and expedite subscription review and approval time.

4

CUSTODIAN

Digital transmission of data, documents, and integrated custodian e-signature policies means expedited processing times, reduced errors, and improved data integrity.

5

TRANSFER AGENT

With the most robust network of transfer agents and fund administrators and the ability to transmit data directly into their processing systems, the entire subscription process can start and finish in as little as 48 hours.



AI INSIGHT
BY iCAPITAL NETWORK

LEARN HOW AIX CAN MEET YOU WHERE YOU ARE
AND TAKE YOU WHERE YOU WANT TO GO.

aixplatform.com/aiinsight | info@aixplatform.com | 833-524-9249