

# ONE SMALL STEP FOR WEALTH MANAGERS. ONE GIANT LEAP FOR ALT INVESTING.

Industry leaders, AIX and AI Insight have partnered to offer an unprecedented edge to advisors and firms looking to seize the opportunity of alternative investments.

## CHANGING THE GAME FOR THE GOOD OF EVERYONE

For as long as any advisor or wealth manager can remember, the road to alternative investing has been a perilous one, paved with endless paperwork, training requirements, NIGOs, still more paperwork, and of course, the risk of any number of compliance-related issues. It's enough to deter even the boldest from pursuing alternatives at all — until now.

AIX has reinvented the process with a platform that enables seamless, straight-through processing. In partnership with AI Insight, we have eliminated the many hurdles that advisors, broker dealers, and of course compliance officers, encounter surrounding the certification and purchase process.

## HOW IT WORKS

1

### SINGLE SIGN-ON TO INITIATE PURCHASE



- When advisors log into the AIX platform to initiate a purchase, there is a real-time lookup to check if they have completed the required training module.
- If training is necessary, one click takes them to the AI Insight platform where they can complete the training instantaneously.

2

### REAL-TIME VERIFICATION TO CONFIRM TRAINING



3

### DATA TRANSMISSION TO COMPLETE PURCHASE



- With training requirements met, the purchase continues with data being sent digitally to all necessary parties.
- And when the purchase is completed, simply sign-on to access post-trade analytics and monitor performance. It's that simple.

4

### POST-TRADE REPORTING TO MONITOR PERFORMANCE



## SEE IT TO BELIEVE IT

Visit [AIXplatform.com](https://AIXplatform.com) to schedule a demo.

