



Alternative Investment Insight Through Research, Training and Increased Efficiency

## Position Available

### Job Description:

AI Insight is currently seeking an Independent Contractor Associate to be a part of our Client Services team. The position offers flexible work hours and the ability to work from home.

The AI Insight alternative investments training and research platform is robust, requiring an initial training period with an eventual in-depth knowledge of the system. In this position you will:

- Receive incoming requests via our Customer Care service line and email inbox
- Resolve user questions promptly and/or escalate as appropriate
- Make outgoing calls to gather customer feedback and promote available resources
- Record all interactions in the CRM system

The position will be up to 15 hours per week mainly during the hours of 8:00 a.m.-6:00 p.m. EST and requires availability on Friday afternoons. You will need a computer with web access and a phone. There is an opportunity to increase both hours and hourly rate based on proven performance.

### Skills Required:

- Excellent communication skills
- Ability to work effectively in an independent work environment
- Strong organizational skills
- Understanding of Microsoft 365 - including PowerPoint, Word, and Excel
- Ability to quickly learn computer programs (both the AI Insight system and the CRM system [SalesForce] we use to track support calls)
- Understanding of the financial services marketplace (experience as a financial advisor, sales assistant, product sponsor sales associate, and/or support in a brokerage firm) is a plus

### Contact

If you are interested, please contact Ann Saline, Senior Director, Financial Firm Implementations and Client Services at [asaline@aiinsight.com](mailto:asaline@aiinsight.com).

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With AI Insight, approximately 160 broker dealer and RIA firms representing 50,000 financial professionals perform thorough, independent analysis of investments before presenting them to clients, including customized online offering document-based training. AI Insight works with more than 140 alternative investment managers whose investments are included on the platform. AI Insight users benefit from a 360-degree alternative investment platform to perform research, customize regulatory-compliant training, store detailed compliance documentation and connect with other high-level industry professionals. AI Insight's team of alternative investment product, research and customer service professionals bring in-depth knowledge representing a variety of sectors. For more information about AI Insight, visit [www.aiinsight.com](http://www.aiinsight.com).