





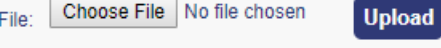
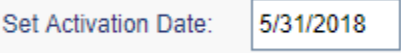
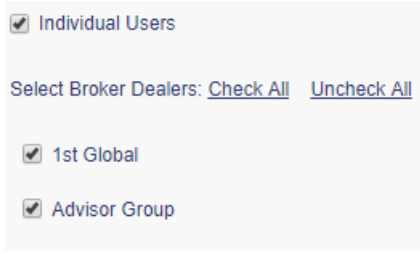
# AI Insight Quick Reference Guide

## Add & Manage Alternative Investment Manager Events



Alternative Investment Insight through Research, Training and Increased Efficiency

**Use AI Insight’s Events feature to promote webinars or other events happening at your firm to AI Insight’s broker dealer and due diligence contacts. Easily share your information with the contacts you choose directly through the AI Insight platform.**

Navigation	Instructions to Add an Event
	<p>1. Click the “<b>Updates &amp; Events</b>” icon at the top of the AI Insight dashboard, then select “<b>Manage Events</b>”.</p>
	<p>2. To select the broker dealer key contacts you want to invite to your event, click the “<b>Manage Broker Dealer Permissions</b>” button.</p>
	<p>3. Choose who will be able to view your event. There are 3 options to select from:</p> <ol style="list-style-type: none"> <li><b>Broker dealers that currently have selling agreements with your firm.</b> If you select this option, the event is also open to the advisors. <i>Note: This option doesn’t filter by offering if there is more than one offering.</i></li> <li><b>All broker dealers that subscribe to AI Insight.</b> <i>Note: Those without a selling agreement will NOT be able to make the event viewable to their advisors.</i></li> <li><b>Select from a checklist of all broker dealers that subscribe to AI Insight.</b> <i>Note: Those without a selling agreement will NOT be able to make the event viewable to their advisors.</i></li> </ol> <p>Make your selections, then scroll down to click the “<b>Save</b>” button.</p>
	<p>4. Click the “<b>Add New Event</b>” button under the “<b>Manage Events</b>” menu. Then, fill out the details of your event in the fields provided.</p>
	<p>5. <i>Optional:</i> Upload a document related to your event.</p>
	<p>6. Choose the date the event will be viewable on the AI Insight platform.</p>
	<p>7. Adjust the access permissions as needed. Select “<b>Individual Users</b>” to allow Individual RIA subscribers to view your event. Then, scroll down and click the “<b>Add</b>” button to save.</p>

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### View or Edit Upcoming Events

To view upcoming events, click the “**Updates & Events**” icon at the top of the AI Insight dashboard, then select “**Manage Events**”. From here, you can view, edit, delete or export the event information.

EVENT	LOCATION	START	END	DESCRIPTION	VIEW EVENT	EDIT	DELETE	VIEW INDICATIONS OF INTEREST	EXPORT AS CALENDAR EVENT
InPoint Commercial Real Estate Income Portfolio Update	https://attendee.gotowebinar.com	07 Jun 2018 03:00 PM	07 Jun 2018 03:30 PM	InPoint Commercial Real Estate Income, Inc. Surpas. <a href="#">Read in full</a>	<a href="#">View</a>	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">View Indications of Interest</a>	<a href="#">Export</a>

### View Past Events

To view past events, click the “**Updates & Events**” icon at the top of the AI Insight dashboard, then select “**Manage Events**”, then click the “**View Past Events**” button.

### Questions? Contact Your AI Insight Account Manager:

- **Jen Ronan, VP-Client Engagement, at 877.794.9448 ext. 703 or [jronan@aiinsight.com](mailto:jronan@aiinsight.com).**
- **Patty Villani, Sponsor Relations, at 877.794.9448 ext. 730 or [pvillani@aiinsight.com](mailto:pvillani@aiinsight.com).**

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