

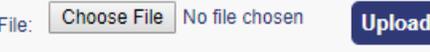
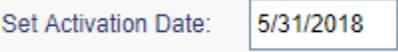
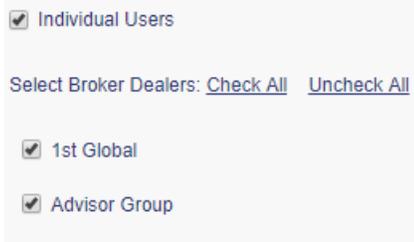
AI Insight Quick Reference Guide

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 “Updates & Events” icon at the top of the AI Insight dashboard, then select “Manage Events”.</p> |
|  | <p>2. To select the broker dealer key contacts you want to invite to your event, click the “Manage Broker Dealer Permissions” 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"> Broker dealers that currently have selling agreements with your firm. 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> All broker dealers that subscribe to AI Insight. <i>Note: Those without a selling agreement will NOT be able to make the event viewable to their advisors.</i> Select from a checklist of all broker dealers that subscribe to AI Insight. <i>Note: Those without a selling agreement will NOT be able to make the event viewable to their advisors.</i> <p>Make your selections, then scroll down to click the “Save” button.</p> |
|  | <p>4. Click the “Add New Event” button under the “Manage Events” 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 “Individual Users” to allow Individual RIA subscribers to view your event. Then, scroll down and click the “Add” 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.

The screenshot shows the 'Manage Events' dashboard. At the top, there is a navigation bar with icons for Home, Education & Training, Programs, Broker Dealers, Updates & Events, Reports & Logs, Admin, Profile, Favorites, Support, Alerts, and Logout. Below this is a sub-navigation bar with 'Manage Events' selected, a 'Video Tutorial' button, and a 'Help' dropdown. A search bar is present with fields for 'Date From', 'To', and 'Keyword', along with 'Search', 'Clear Search', 'Add New Event', and 'Manage Broker Dealer Permissions' buttons. A 'View Past Events' button is also visible. Below the search bar, there is a table of events with columns: EVENT, LOCATION, START, END, DESCRIPTION, VIEW EVENT, EDIT, DELETE, VIEW INDICATIONS OF INTEREST, and EXPORT AS CALENDAR EVENT. The table contains one event: 'InPoint Commercial Real Estate Income Portfolio Update' with a location URL, start/end times of 07 Jun 2018 03:00 PM, and a description. Action links for 'View', 'Edit', 'Delete', 'View Indications of Interest', and 'Export' are provided for this event.

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.

This screenshot is identical to the one above, but the 'View Past Events' button is highlighted in a darker blue, indicating it is the active selection.

Questions? Contact Your AI Insight Account Manager:

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