

# SPONSOR PROFILE



Alternative Investment Insight Through Research, Training and Increased Efficiency

## LEADERSHIP



**Sherri Cooke**  
President and CEO



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Executive Vice President and COO

## ABOUT AI INSIGHT

AI Insight's comprehensive online platform offers access to alternative investment research, training and compliance documentation tools. These capabilities give you the confidence you need to expand your product lines.

## WHY INSIGHT?

AI Insight gives you the opportunity to connect with other alternative investment industry professionals, research and train on specific funds, and keep detailed compliance documentation — all on one convenient, online platform.

- ✓ Use AI Insight to perform thorough, independent analysis of investments before presenting them to clients
- ✓ Require regulatory-compliant training on funds from your advisors, customized to your firm's requirements
- ✓ Conduct performance monitoring on hundreds of funds using timely financial reporting data, including leverage statistics, capital raised, distribution ratios and more
- ✓ Track and store detailed compliance documentation on training and research
- ✓ Opportunity to improve E&O coverage and reduce rates

## INVESTMENT TYPES SUPPORTED

- ✓ Closed-end Funds
- ✓ Private Placements
- ✓ Liquid Alts
- ✓ Hedge Funds
- ✓ Private Equity
- ✓ Managed Futures
- ✓ Energy
- ✓ DSTs
- ✓ REITs / BDCs



RESEARCH



MONITORING



FUNDS



RISK MANAGEMENT



DOCUMENTATION



EFFICIENCY



CE



TRAINING

DISCOVER ALTERNATIVES

DEMONSTRATE KNOWLEDGE

DOCUMENT EFFORTS



## AI INSIGHT SOLUTIONS

### Advisors and RIAs

- ✓ Research alternative investment options
- ✓ Compare features of programs
- ✓ Fulfill your Continuing Education and Firm Element requirements
- ✓ Monitor the performance of funds
- ✓ Document all of your due diligence efforts in one place

### Broker-Dealers

- ✓ Share a consistent set of information on alternative investment programs with home office personnel and investment committee members
- ✓ Access offering documents
- ✓ Train advisors and internal personnel
- ✓ Monitor and document your firm's training and due diligence
- ✓ Monitor the performance of hundreds of alternative investment funds using AI Insight's financial reporting data, including leverage statistics, capital raised, distribution ratios and much more
- ✓ Source alternative investment options and connect with fund sponsors
- ✓ Streamline regulatory audits

### Fund Sponsors

- ✓ Connect with your target market
- ✓ Efficiently provide product and marketing support to your clients
- ✓ Ensure that your funds are being presented in a consistent format



Contact us at 877-794-9448 or [www.aiinsight.com](http://www.aiinsight.com)  
to request a live tour and find out which subscription option will best suit your needs.