

Altigo Signs Tenth Broker-Dealer Partnership

[Altigo](#), an electronic order entry and subscription processing platform for alternative investments, has now hit double digits in its expansion of broker-dealer partnerships. Firms including Benchmark Investments, Coastal Equities, Great Point Capital, Lightpath Securities and more recently Emerson Equity, Kingswood and Aurora Securities have chosen Altigo to digitally manage their alternative investments business.

Firms using the platform have seen how Altigo's intuitive workflow facilitates order entry by integrating home office and custodial forms and providing access to all firm-approved offerings in one online portal, increasing both rep productivity and compliance control.

"I cannot emphasize enough how much Altigo has simplified the purchase application process. If a client is investing in 4 different products, the first purchase agreement can be completed in 10 minutes instead of 30, with subsequent ones in even less time," said Frank Piscitelli, a registered representative at Archer Investors with Lightpath Securities. "The auto-populating features significantly reduce NIGOs. The time saved provides more time to reach out to present and future clients."

70% of subscriptions are submitted for acceptance by the sponsor the same day, and every step of the process is trackable in real time. Additionally, reps and compliance officers have peace of mind knowing that Altigo has completed a SOC 2, Type II audit, [demonstrating the platform's commitment to data security](#).

Several firms initially signed up for a pilot program to determine the effectiveness of using Altigo to process their alternative investment business. The program has been a resounding success, concluding with a decision to move forward with a firm-wide rollout to all registered reps.

"Altigo has demonstrated its ability to make our processes more efficient, making it so much easier to review and approve investments," said John Neppel, Principal at Great Point Capital. "Implementation of the platform went smoothly and we were thrilled with the speed that new firm-approved offerings were set up. We are eager to roll the platform out to our entire rep base to fully realize Altigo's potential for our firm."

Altigo's growth is poised to continue throughout 2021 with even more features being added. [Redtail integration](#) has recently been added, which helps speed up the data entry process for reps and advisors by populating data directly from their CRM.

AI Insight integration is also slated for release later this month which will help ensure rep training is complete if it is required by the firm before the package is sent for signature. The remainder of the year will see integrations with additional CRM platforms, custodians, clearing firms, transfer agents and fund admins as well as more product discovery and comparison features in [Altigo Marketplace](#).