

Altigo Rolls Out Product Focus Group Effort to Optimize Platform for Users

WealthForge announced today that Altigo, their electronic order entry and subscription processing platform for alternative investments, is rolling out a series of focus groups designed to capture user feedback to help prioritize feature set development and optimize the platform. A select group of RIA, BD and sponsor users will be invited to participate and help shape the future of the product.

The first session with RIA users kicked off last week with Box Financial, CAVRIA Advisors, Durbin Bennett Wealth Advisors, Insight Investment Advisers, MJP Wealth Advisors and Sera Capital among the initial participants. The Altigo product team outlined upcoming enhancements on the roadmap and gathered real-time feedback around what matters most to RIA users. Features including expanded sort, filter and comparison tools, 3rd party due diligence reports and other integrations, and non-subscription workflows like redemptions, PPM distribution and tracking, and change of address were discussed. The recurring theme emerging from the session is that time savings is key and any features that can abbreviate the investment process are highly beneficial.

"I'm already seeing substantial time and cost savings using the features currently available on the Altigo platform," said Josh Wright, President at Insight Investment Advisers. "I'm thrilled to be part of this ongoing focus group to help make Altigo even more valuable to advisors and the alts community as a whole."

The Altigo product team will continue focus group sessions with broker-dealer and sponsor clients in the coming weeks. "It's vital that we incorporate feedback from all users of the platform to build a best-in-class solution," said Mat Dellorso, Co-founder at WealthForge. "Our goal is to develop the industry standard platform for investing in alternatives. Our growing community of users is key to deciding what that standard should be."

If you would like to be considered to participate on the Altigo product focus group, please contact your client success manager or email us at clientsuccess@altigo.io.