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### Why are more financial advisers recommending alternative investments for their clients' retirement accounts today?

Most people think the only investment options for their retirement plan are public equities, such as stocks, bonds and mutual funds. The good news is that IRAs allow for a much broader scope of investment options, and many advisers are helping investors gain access to the alternative investment markets to help increase diversification, invest in more tangible asset classes and to better prepare for changing market cycles. Alternative asset classes include: real estate, private notes and mortgages, private equity, precious metals, cryptocurrencies, and much more.

### Who is NuView Trust?

Whether you're an adviser, broker-dealer or investment sponsor with an alternative product, you've come to the right place for your alternative asset custodial solutions. As a premier, regulated custodian for self-directed alternative investments, you don't have to worry about NuView competing for your clients, as we never offer advice or investment products. With over $2 billion in investor assets, and nearly 20 years of operational expertise, our sole business is to provide the custody and IRS reporting for the following types of plans:

- Traditional and Roth IRA
- SEP and SIMPLE IRA
- Education Savings Accounts and Health Savings Accounts

We also offer custodial solutions for the following:

- Record-Keeping Accounts for Qualified Plans (Employer sponsor plans, such as 401k, Pension and Profit-Sharing)
- Non-qualified Custodial Agency Accounts (Individual, Joint, Organization, Trust)

### How is NuView different from traditional custodians?

While most custodians focus on publicly traded securities that limit the full myriad of investment choices afforded to IRAs, NuView Trust gives them the ability to effortlessly invest into alternative assets of their choosing. We are purpose-built to provide investors with more choices while ensuring that their investment is purchased quickly and efficiently.

At NuView, we offer true diversification through a large variety of alternative assets. And while studies show that alternative assets will exceed $17 trillion by the year 2025, the time to help your clients accelerate their wealth is now.

We believe the process for custody of alternative investments should be easy and expedient, which is why we created a tailor-made platform to serve the investment sponsor and adviser communities. With more than 50 years of combined management experience in alternative asset custody, we have cultivated deep relationships in our industry. Those relationships have shaped our business. We solicited input from industry leaders and implemented an efficient and high-touch investment process. The result? We're simple to do business with. Our clients appreciate a streamlined onboarding process and customized documents for each unique investment. When you have questions, we have answers. We're both accessible and responsive — with technology when you want it, and a live person when you don't.

### Features of NuView

**Bulk transfers —** Stop losing clients due to high fees and transfers out due to assets being resigned from traditional custodians. NuView specializes in bulk transfers — keeping the onboarding process simple and cost-effective. With our help, we can minimize the time, effort, and paperwork involved, so you can devote more time to focusing on your clients and their needs.

**Empower advisers —** As an adviser, you can access your clients' account information 24/7 through our online customer portal* — giving you and your client the ability to manage payments, view updates and change personal information. We also offer portal integration with a variety of third-party data aggregators, simplifying your book of business and how you manage your client accounts.

**Easy account management —** Our secure document uploading process expedites each client's account creation and makes it as painless as possible.

**Increase efficiency —** NuView's unique onboarding experience is guaranteed to reduce data entry efforts and possible errors by educating you and your clients on completing client paperwork via video tutorials, personalized meetings, etc.

**Dedicated account managers —** You and your clients will be assigned a dedicated NuView relationship manager who understands your business needs and can assist you daily. Whatever you may need, our team is here to help!

*All adviser account access must be approved by the individual client.

### We custody a wide array of alternative products, such as:

- **Private Equity (private stock, LLC, LP)**
- **Physical Real Estate**
- **Non-Traded REITs**
- **BDCs**
- **Commodities and Managed Futures**
- **Private Debt**
- **Structured Settlements**
- **Deventures**
- **And more ...**


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**CONTACT INFORMATION**

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