

Altigo

Look for the difference

All alts subscription processing solutions are not alike

The Altigo difference

With remote work becoming more prevalent, many wealth management firms are looking into technology solutions that digitize paper-based processes. Some firms are adopting straight-through processing solutions like Altigo, while others are attempting to create their own solutions.

Electronic signature alone is simply a partial automation of existing problematic processes. Altigo is a reimagining of the entire alternative investment process that connects all stakeholders and creates an improved, scalable experience for broker-dealer and RIA firms.

What sets Altigo apart from other straight-through platforms?

There are several solutions in the marketplace that are essentially a library of PDF documents. Our platform, Altigo, doesn't start with a document. It starts with a question and guides the adviser through an intelligent workflow process. When it comes to offerings, we have taken an "open network" approach. Some platforms decide for the investor which products are appropriate and only allow access to those products. We believe advisers are capable of doing their own investment research, and don't need us to curate and tell them what the best product is.

Our approach is much more an open-network, technology approach. We aren't competing with the asset manager to choose products. Our approach seems to be working, as we are seeing great transaction growth. We have over **130 broker/dealer and RIA firms** on the platform. We have done over **4,000 transactions**, which represents more than **\$1 billion of volume**. And we believe this is just the beginning. Straight-through processing is a growth opportunity not only for us, but for the alternatives industry in general.



Altigo, an electronic order entry and subscription processing platform from WealthForge, is built to address common industry roadblocks, enable marketplace connections, and facilitate alternative investment transactions between reps, advisers, asset managers, custodians and transfer agents.

CORPORATE CONTACT

Email sales@wealthforge.com or call 866.603.4115 to learn more.

This article presents the author's present opinions reflecting current market conditions. It has been written for informational and educational purposes only and should not be considered as investment advice or as a recommendation of any particular security, strategy or investment product.

Contributor



Bill Robbins, CEO, brings more than 25 years of experience in growing brokerage platforms, and provides strategic oversight and leadership at WealthForge. Prior to joining WealthForge in 2015, he served as president of BB&T Securities Services, leading teams that supported the firm's brokerage platform and operations.

How Altigo compares with common DIY solutions

	Paper Processing	Electronic Signature	
<i>Product Discovery</i>	No	No	Offering showcase of all firm-approved live offerings, configurable on a rep-by-rep basis.
<i>Easy Subscription Order Entry</i>	Complicated paper documents that take hours to complete and result in NIGO rates of 40%–60%.	Form-fillable PDFs ensure signatures aren't missed, but only mitigate a small percentage of NIGO errors.	Intelligent interview process can be completed in 15 minutes or less with NIGOs < 5%.
<i>Saved Investor Information</i>	No	No	Investor information can be imported into a new subscription from a previous investment or CRM system.
<i>Document Mapping</i>	No	Complex subscription documents must be mapped manually by your firm.	Altigo maps all subscription documents as well as broker-dealer home office required documents.
<i>Automated Document & Data Routing</i>	No	Only during signing process.	Altigo can integrate with existing review processes, and custodian, transfer agent, and sponsor systems.
<i>Cybersecurity</i>	No	Only during signing process.	Sensitive data is encrypted and secure throughout the process. PII is double encrypted. Monitoring and recovery features are built in.