

Over \$1 Billion Transacted on Altigo

Altigo has crossed the \$1 billion mark in alternative investments completed on the platform, representing nearly 4,000 alts subscriptions since its debut in mid-2019. Altigo's growth and adoption is increasing at a blistering pace, with almost 80% of the dollar volume transacted occurring this year alone. Its user base has grown to more than 100 asset managers and 130 broker-dealer and RIA firms, with 150 alternative investment offerings currently "live" and accepting investments on Altigo.

Altigo's success and high rate of both sponsor and advisor adoption is due to the meaningful results it provides. The platform reduces NIGO (not-in-good-order) error rates from 30-60 percent down to 4 percent and boasts investment cycle-times of 2 days, compared to approximately 3-4 weeks on average using paper processes. Orders can be completed in 20 minutes or less, with 70% submitted for acceptance by the sponsor the same day.

Today, Altigo supports a range of alternative investment offerings, including Non-Listed REITs, Qualified Opportunity Zone Funds, Non-Listed Preferreds, Direct Private Placements, DSTs and Non-Listed BDCs. Four out of the top 6 DST sponsors, including Inland Private Capital, Capital Square, Cantor Fitzgerald, and Passco have seen the speed and efficiency that Altigo provides and have contributed to its growth. Some sponsors are even providing exclusive early access to their offerings on Altigo, up to 5 days before accepting outside subscriptions, because of the efficiencies the platform provides.

"Our broker-dealer and RIA partners have told us that with Altigo, it's just easier to do business with us," said James Brunger, Executive Vice President, National Sales at Capital Square. "With Altigo we see fewer errors, faster investment turnaround and strengthened relationships with the reps and advisors we work with."

Wealth managers have seen Altigo streamline investment processing and compliance by providing access to all firm-approved alternative offerings in a single white-labeled portal and includes custom firm forms and custodian partners' letters of investment authorization within the workflow. The platform also integrates with popular CRM and compliance and risk management tools. In addition to these productivity and efficiency-related improvements, users benefit from [the platform's commitment to data security](#) evidenced by its completed SOC 2, Type II audit.

"Our reps have really enjoyed and embraced using Altigo," said Drew Jackson, President and CEO at Concorde Investment Services. "It has allowed our reps to save time on paperwork and focus on investors. Altigo also allows us to be a better partner by getting paperwork right the first time. Quite candidly, we wouldn't be where we are today if we didn't have excellent tech tools like Altigo. We've been thrilled with how that's been working for us."

"It's hard to believe we were celebrating \$250 million transacted on the platform in Q1 of this year and by Q4 we're surpassing \$1 billion," said Bill Robbins, CEO at WealthForge. "This year has really demonstrated how Altigo meets a need for an easier alts investment process. It represents a growth opportunity not only for us, but for the alternatives industry in general."