

Altigo Surpasses \$2B in Transactions

Only seven months after hitting the \$1 billion mark, Altigo has crossed \$2 billion in alternative investments completed on the platform, representing more than 8,600 alts subscriptions since its debut in mid-2019. Altigo's growth and adoption continues with its adviser user base now topping 185 transactional broker-dealer and RIA firms, with over 200 alternative investment offerings currently "live" and accepting investments on Altigo.

Today, Altigo supports a range of alternative investment offerings from nearly 100 sponsors, including non-listed REITs, qualified opportunity zone funds, non-listed preferreds, interval funds, direct private placements, DSTs, private equity funds, and non-listed BDCs. Nine out of the top 10 DST sponsors, including Inland Private Capital, Capital Square 1031, Cantor Fitzgerald, ExchangeRight, and Passco have seen the speed and efficiency that Altigo provides and have contributed to its growth.

"Cantor Fitzgerald was the very first sponsor to sign up with Altigo when it launched in 2019 as we shared a common vision for using technology to make it easier for advisors to do alts business and to improve the overall experience for the end investor," said Jay Frank, President at Cantor Fitzgerald Asset Management. "We are thrilled with the progress that the entire industry has made by embracing Altigo as a solution that makes alts investments incredibly easy."

Altigo's success and high rate of both sponsor and advisor adoption is not only due to meaningful results such as reduced NIGO (not-in-good-order) paperwork error rates (to as low as 4%), but also to lightning-fast order entry. A key benefit that sets Altigo apart from other platforms is the team behind it and its commitment to client experience. IBN Financial Services, a broker-dealer recently partnered with the platform, spoke about the onboarding experience:

"These guys have been absolutely great," said Rick Carlesco, CEO at IBN. "They went to our conference, they talked to our reps, they did individual training—they walked us through the entire process. Change from the old-fashioned way of submitting paperwork can be difficult but the continued training, communication and support from the team truly sets Altigo and the team apart."

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. Altigo also includes custom firm forms and custodian partners' letters of investment authorization within the workflow. The platform integrates with popular CRM and compliance and risk management tools as well.

"Before I started using Altigo, I had to painstakingly populate each subscription document and

depending on the number of alternatives involved in the order, it could take hours to fill in all of the necessary forms,” said Chloe Guinan, Operations Associate at Claraphi. “With Altigo, I simply choose the asset that the client wishes to invest in, select the advisor, enter the client information one time, and the system pre-populates all of the necessary documents for me. Along with the subscription document, the required custodial documents are included in the bundle that can be sent to the client for electronic signature directly through Altigo’s system.”

Altigo will be rolling out even more features and functionality in the second half of the year, helping to expand its value to the market.

“We are pleased by the rate of adoption from wealth management firms and fund managers with our second billion dollars coming only seven months after our first,” said Mat Dellorso, Co-founder at Altigo. “It’s a testament to our team, the desire for portfolio diversifying investments in the market, and the need for transformative technology to make the process easier for all to do more business. This speed of adoption on Altigo enables us to expand across more and more firms in the alternative investment market, bringing greater efficiency to the industry.”