



Alternative Investment Insight through  
Research, Training and Increased Efficiency

## Alternatives are complex. Here's how to make sense of them for clients.

*“About 67% of advisers say lack of understanding is one of the main reasons why they don’t invest more heavily in alternatives.” [i] Regulatory requirements and operational challenges add to the complexity. But, as complex investments become easily accessible to everyday investors who are looking for new investing opportunities, it’s critical that you stay one step ahead to understand these products and help your clients make sense of them.*

**Obstacle: Complex products can be difficult to track because many managers don’t make their data available.**

Opportunity: Lack of understanding complex products can be addressed by gaining more transparency to help you better explain these products to your clients. Using an unbiased online resource to get hard-to-find industry data on complex products can help. For example, AI Insight provides data on hundreds of Alternative Investments including 120+ private offerings. Plus, get unbiased monitoring of key performance metrics for 140+ nontraded REITs, BDCs and closed-end interval funds.

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**Obstacle: Not only do you need be able to clearly differentiate between traded and nontraded alts, but you also need training at the product level to gain a deeper understanding of the complex products you’re offering — and meet your regulatory requirements. Plus, the operational requirements can be overwhelming for broker dealers, RIAs and advisors. Working with illiquids requires a significant amount of paperwork, due diligence research and an infallible way to track for compliance purposes.**

Opportunity: Over 150 broker dealers and RIAs use AI Insight to help research new products for due diligence purposes. Most require their advisors to use the platform to facilitate product education on nontraded alts, including 72 percent of the top broker dealers in 2016[ii]. Working with traded alts? Research reports will be available on AI Insight starting in August. **Get more information.**

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**Obstacle: You're concerned that you can't explain certain alternative investment products to clients, but you want to include more complex products to provide more diversification in clients' portfolios.**

Opportunity: Educating yourself on complex products can better equip you to answer client questions and feel more confident in adding Alternative Investments to your clients' portfolios. AI Insight's News and Alerts feature can provide you with all the regulatory updates on the hundreds of funds available on the platform according to your preferences. If you need a deeper dive, you can easily connect with fund managers directly through the platform.

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**Obstacle: Compliance and regulatory issues are ranked as the most stressful concern for advisors. [iii]**

Opportunity: As the number of complex products available to investors increases, so do the regulatory requirements. When you conduct research or complete a product-specific education module on AI Insight, it automatically tracks your activity. You can access or download your documentation in the Training, Education and Research log.

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Use AI Insight's easy-to-use online platform as a solution help explain offerings efficiently to clients, enhance their portfolios and create confidence in your process. **Contact us** to learn more and request a live tour customized to your business needs.

[i] More Advisors Use Alts, But Few Understand Them by John Waggoner, InvestmentNews

[ii] Top Broker Dealers of 2016 – InvestmentNews Broker Dealer Data Center

[iii] Insights into Advisor Wellness by Flexshares

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