

# Alternative Investment Information, Tools and Alerts at Your Fingertips

Financial Advisors' Guide to



Access AI Insight's sophisticated tools to help you demonstrate in-depth alternative investment product and sector knowledge—and more quickly strengthen conversations with clients and prospects.



*"Unlock the door to comprehensive, detailed information on hundreds of alternative investments through AI Insight, including real estate, BDCs, private equity, managed futures, hedge funds and more."*

# NAVIGATE THE DASHBOARD

Information, tools and alerts at your fingertips.

The screenshot shows the AI Insight dashboard interface. The top navigation bar includes links for Home, Programs & Sponsors (1), Education & Training (2), News & Events, Reports & Logs, Support, Favorites (3), My Profile (4), Alerts, and Logout. Below the navigation bar, the dashboard is divided into several sections:

- Alternative Investments by Sector:** A list of sectors with counts: Real Estate (121), Private Equity/Debt (42), Real Estate Loans & Securities (17), Hedge Funds (13), and Oil & Gas (12). A "View More" button is at the bottom (7).
- Education Modules:** A table listing required tests and optional programs. A "View All" button is at the bottom (5).
- Financial Performance Reporting:** A section with a bar and pie chart, and a "Create Reports" button (6).
- Compliance Logs:** A table showing test results for ACAP Strategic Fund and Any Broker Dealer Policies & Pro... (7).
- Reports/Compare Programs:** A table comparing four programs based on expiration date, remaining capital, and maximum offer (8).
- News & Alerts:** A section with system alerts and a "Manage News & Alerts" button (9).

## 1 Programs & Sponsors

View your firm's approved alternative investment programs and sponsor contact details.

## 2 Education & Training

Access your firm's approved product-specific and CE training modules. Locate additional resources, such as whitepapers, regulatory notices, etc.

## 3 Favorites

Set up shortcuts for your preferred features to more easily navigate AI Insight.

## 4 My Profile

Complete and manage your profile details, licenses and professional designations to receive notices on programs and educational opportunities.

## 5 Education Modules

Find training modules for your firm's approved programs.

## 6 Financial Performance Reporting

Set up custom email alerts and reports for unbiased monitoring of key performance indicators through the lifecycle of an investment (*a premium feature*).

## 7 Compliance Logs

All of the training and research you complete on AI Insight is recorded for easy compliance documentation and retrieval.

## 8 Comparative Reports

Compare two or more programs based on criteria listed in the Program Summary and Corporate Summary.

## 9 News & Alerts

Receive daily notifications on your firm's approved programs.

# ENHANCE PRODUCT KNOWLEDGE

Begin your research on AI Insight in two ways.



Dashboard Sponsors & Programs

Video Tutorial Help

**Alternative Investments by Sector**

- Real Estate (121)
- Private Equity/Debt (42)
- Real Estate Loans & Securities (17)
- Hedge Funds (13)
- Oil & Gas (12)

**Education Modules**

Required Tests	Optional – but required to sell program
AI Insight Structured Products Payoff...	295 BR Holdco DST
Ann Test X	ACA The Chelsea, LLC
Cheryl Test 6 28 2016 - A	ActivCare Income Fund, L.C.
IPA Course I: Fundamentals of Direct...	AEI Net Lease Portfolio V.DST
	Aetna

**Financial Performance Reporting**

Access financial performance summary, create financial charts, create customizable alerts for

Research a specific product or sponsor by typing in the name and clicking on the magnifying glass.

Perform sector-specific research by selecting the asset class under "Alternative Investments by Sector".

*Either search option allows you to easily access product-specific information*



## PERFORM PRODUCT-SPECIFIC RESEARCH

Everything you need to conduct research can be found here.

Sponsor Name	Fund, Inc.	Private Equity/Debt	Public	Closed-End Fund	05/09/2013	Continuous offering	\$183,500,000	\$1,500,000,000	Add/View
Program Summary	Start Education Module	Broker Dealer Sponsor Summaries	Download Offering Documents						
Corporate Summary	My Compliance Log	Broker Dealer Program Summaries	Request Offering Materials						
Executive Summary	Compare to Other Programs	Forms	Send Sponsor Inquiry						
Financial Performance Reporting	Search for Sponsor Support								

Review all of the details about products in the **Program Summary** and sponsors in the **Corporate Summary**.

Access product-specific, prospectus and PPM-based training under **Start Education Modules**. You will find your completed tests logged under **My Compliance Log**.

Perform detailed fee analysis to support your firm's DOL Fiduciary Rule standards with the **Program Compensation Report**.

Choose **Compare to Other Programs** to create powerful product comparisons based on more than 90 different product features, such as offering price, distribution rates or fees.

Select **Search for Sponsor Support**, **Request Offering Materials** and **Send Sponsor Inquiry** when you have requests for wholesalers—saving time and effort.

Download your firm's required forms, recent SEC filings (10Ks, 10Qs, etc.), subscription agreements, brochures and other offering documents under **Forms** and **Download Offering Documents**.

Attention: If your firm has set up a research or training prerequisite, you will find this under "Education Modules" on your dashboard or by clicking on the "Education & Training" icon at the top, then choosing "Education Modules".

## Why AI Insight?

### WHY?

Investors today are increasingly interested in alternative investments for diversification benefits and the non-correlated returns they present.

### HOW?

Advisors who demonstrate in-depth product and sector knowledge around alternative investments will more quickly deepen their conversations—and their relationships—with clients and prospects.

### WHAT?

AI Insight unlocks the door to in-depth, detailed information on hundreds of alternative investments, while offering access to sophisticated reports, tools and alerts to perform analysis, stay informed and document compliance activity.

Support is a phone call or email away.

AI Insight Customer Service  
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Hours:  
8:00 a.m. to 6:00 p.m. ET, Monday through Friday\*

*\*Our offices follow the same holiday schedule as the NYSE.*

Alternative Investment Insight Through Research,  
Training and Increased Efficiency  
[www.aiinsight.com](http://www.aiinsight.com)