

Expedite your alternative investment subscription process.

AIX adapts to the way Broker Dealers do business, not the other way around.

AIX and AI Insight have partnered to offer financial firms an unprecedented edge for investing in alternatives.

AIX is the only enterprise platform that enables authentic straight-through processing – connecting the entire alternative investment sales process.

1

ADVISOR

With built-in AI Insight training verification, live forms, data integrations and e-signature, advisors spend more time servicing clients and growing their business, and less time filling out stacks of paperwork.

2

CLIENT

Clients can quickly review and sign forms from anywhere – allowing for business without in-person meetings, mailing, or faxing.

3

HOME OFFICE

With configurable workflows, your existing operations can flow seamlessly into AIX – centralizing your alternative investment processing, reducing risk, and expediting trade review and approval time.

4

CUSTODIAN

Digital transmission of data, documents, and integrated custodian e-signature policies means expedited processing times, reduced errors, and improved data integrity.

5

TRANSFER AGENT

With direct API connectivity to several industry-leading transfer agents, trades can settle in as little as 1 to 3 days.



**LEARN HOW AIX CAN MEET YOU WHERE YOU ARE
AND TAKE YOU WHERE YOU WANT TO GO.**

aixplatform.com/aiinsight | info@aixplatform.com | 833-524-9249

How it works.

INTEGRATING AIX + AI INSIGHT



single-sign-on to initiate purchase

When advisors log into the AIX platform to initiate a purchase, there is a real-time lookup to check if they have completed the required training module.



real-time AI Insight training verification

If training is necessary, one click takes them to the AI Insight platform where they can complete the training instantaneously.



data transmission to complete purchase

With training requirements met, the purchase continues with data being sent digitally to all necessary parties.

Discover more about the services AIX + AI Insight offer.
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