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Turnkey Solution for Advisors and Wealth Management Firms

Award-winning, seamless, end-to-end solution for the offering and management of alternative investments. Provide a professionally curated menu of quality funds to your investors in a turnkey solution.



Learn about iCapital’s fund sourcing and due diligence [here](#).

Source and due diligence alternative funds on your own? iCapital’s [dedicated access vehicles and tech-enabled workflows](#) can help grow your business.



Provide quality funds, simplify operational processes and improve the investor experience

Access | Education | Support

ACCESS TO A QUALITY
SELECTION OF FUNDS

- Curated menu of private equity, private credit, real estate, and hedge funds from quality alternative investment managers

- Extensive, expert research and due diligence provides initial and ongoing evaluation of fund offerings and performance

INDUSTRY LEADING ADVISOR AND INVESTOR EXPERIENCE

- Seamless user experience with intuitive and consistent workflows
- On-call Investor Relations support for client onboarding and ongoing service
- Full complement of investment services including capital calls, distributions and the management of reporting (PCAPs, K1s, monthly and quarterly updates, etc.)
- Simplified interactions across custodians, fund administrators, and transfer agents
- Electronic subscription process substantially reduces “Not in Good Order” (NIGO) incidents

EDUCATION AND SUPPORT

- Educational resources on the fundamentals and finer points of alternative investing
- Insightful narrative on market trends and emerging opportunities
- Product specialists provide insight and analysis
- Comprehensive materials on all fund offerings

- CAIA program to support advisors' ongoing education



Benefits



QUALITY FUNDS

With investment minimums as low as \$25K



PAPERLESS QUALIFICATION and SUBSCRIPTION PROCESSING



AUTOMATED ALERTS

To keep you up to date with every aspect of the subscription and investment process



DUE DILIGENCE and COMPREHENSIVE PERFORMANCE REPORTING



DOCUMENT REPOSITORY

One-click access to every document



EASY REDEMPTIONS and TRANSFERS

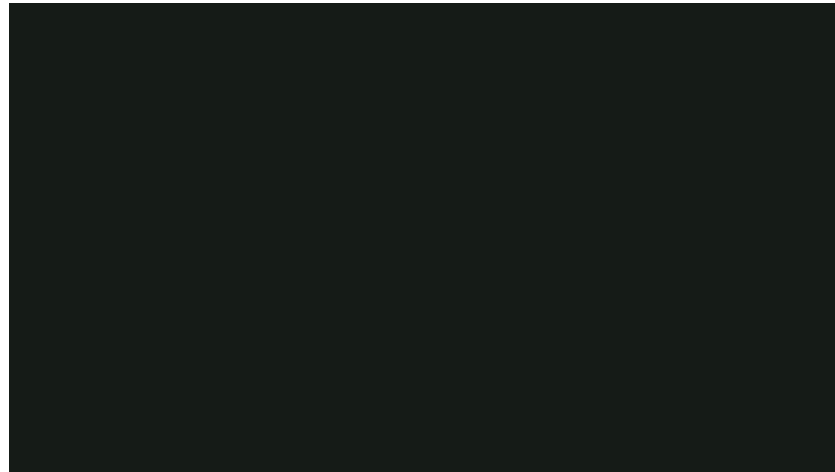


ADMINISTRATOR and CUSTODIAN INTEGRATION



COMPLIANCE and TAX REPORTING

iCapital's Flagship Platform helps grow your business by providing access to a menu of expertly curated investment products and end-to-end automation of the investment origination and management process. Come grow with us.





Distribution Partners

Over 1,300 RIAs, and more than 300 Family Offices and Wealth Management Firms have chosen iCapital as their partner to offer alternative investments via our Flagship Platform.

RECENT MEDIA | [SEE ALL](#)



Democratising Access to Private Credit

December 11, 2019



iCapital To Create Alternatives Platform For PIMCO

November 22, 2019



Janney's New Alts Deal Aims to Capture HNW Needs and Boost Recruitment

November 21, 2019

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iCapital Network® Recognized as Top Fintech Firm by Forbes for Third Consecutive Year

February 18, 2020



iCapital Network® Platform Assets Experience Expansive Growth in 2019

February 4, 2020



State Street Announces New Partnership With iCapital Network

January 23, 2020

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The iCapital team is honored to be included on the @Forbes #Fintech50 list for the third year running! Thank you to our community for helping support us

on our mission as we continue to provide innovative solutions for the industry. <https://icaptl.net/38EIYj1>

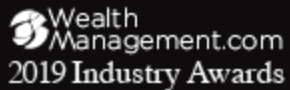
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Investors may be looking for ways to diversify their

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2020 | Forbes Fintech 50

2019 | WealthManagement.com Award

2019 | FinTech Breakthrough Awards

2019 | Forbes Fintech 50

2018 | Forbes Fintech 50

Headquarters

New York City

60 East 42nd Street

New York, NY 10165

212-994-7400

info@icapitalnetwork.com

New Jersey

214 Carnegie Center

Suite 110

Princeton, NJ 08540

Switzerland

Bahnhofstrasse 52

8001 Zürich



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