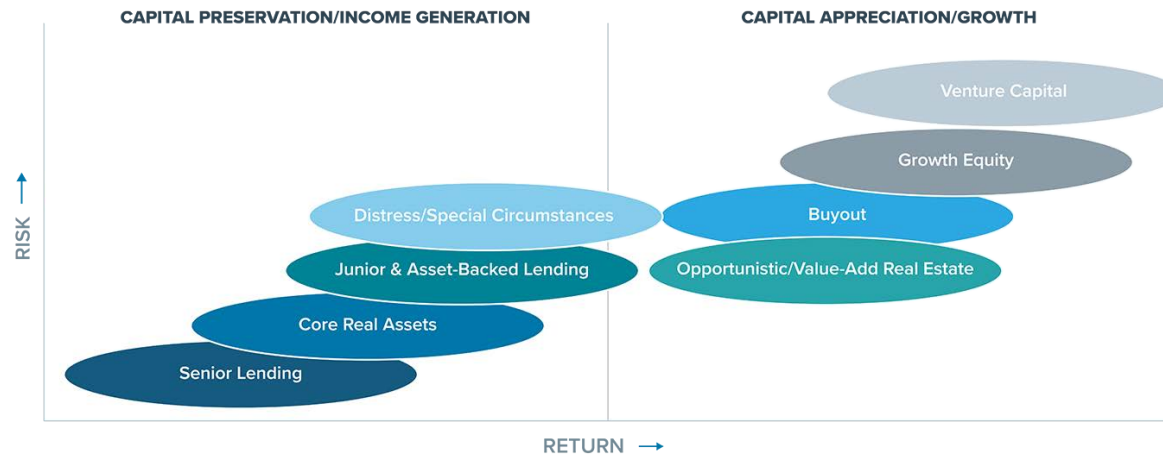




A Wide Variety of Quality Private Investment Opportunities and Hedge Funds

iCapital is the leader in providing the independent wealth advisory industry with a diverse selection of quality private equity, credit, real estate and hedge funds. By providing access to these funds, complemented by institutional-quality investment and operational due diligence, iCapital helps advisors achieve their client's investment goals of growth, income and portfolio diversification.

Private Investment Opportunities



Hedge Fund Opportunities



Expertly Selected by the iCapital Research and Due Diligence Team

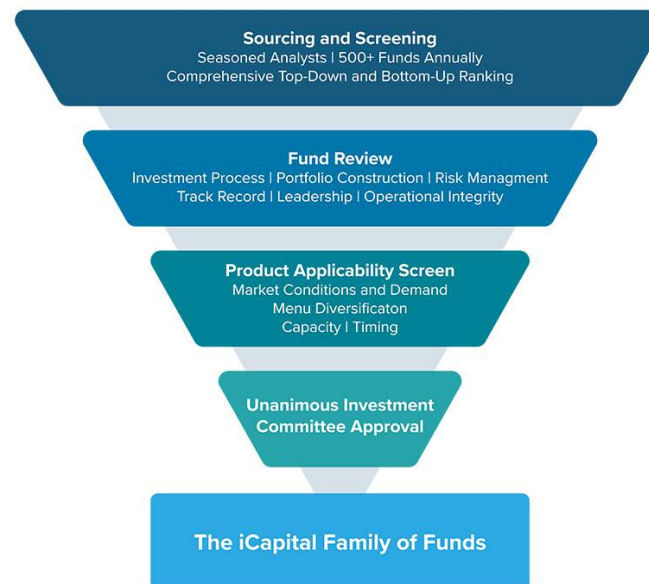
The iCapital Research & Diligence Team serves as an extension of an independent advisory firm, supplementing its practice with dedicated support on alternative investments – from product sourcing and diligence to comprehensive education and counsel on portfolio construction.

EXPLORE OUR FUNDS

Join the iCapital Network!



The iCapital Fund Selection Process



iCapital meets with hundreds of experienced fund managers each year and selects a small percentage of those to be featured on the iCapital flagship platform, covering the breadth of asset types and key strategies across the alternative investment landscape.

Anatomy of a Fund Review



Comprehensive Due Diligence to Monitor for Red Flags and Proactively Identify Issues for the Life of the Investment

- Attend GP Annual Meetings
- Quarterly update calls/webinars

- Regular calls/meetings
- Performance analysis

- Opportunity set review
- Ongoing quantitative analysis
- Cash flow planning
- Public news sources

- Personnel changes
- Regulatory items
- Fund amendments



Support Services

MARKET COMMENTARY AND TRENDS

Insights on market trends and conditions and the risk/reward dynamics of investment strategies

EDUCATION

Comprehensive educational tools on the fundamentals of private investing and new product structures

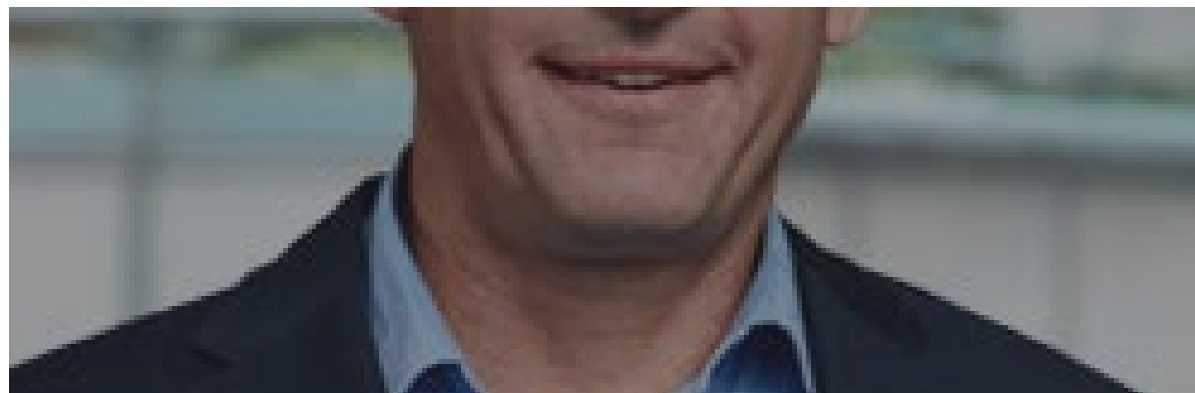
CONSULTATION

iCapital product experts are on hand to help build advisors' understanding of investment strategies within a portfolio's construction



Research and Due Diligence Leadership

More than 75 collective years of leadership and expertise in the identification and monitoring of quality alternative investment opportunities





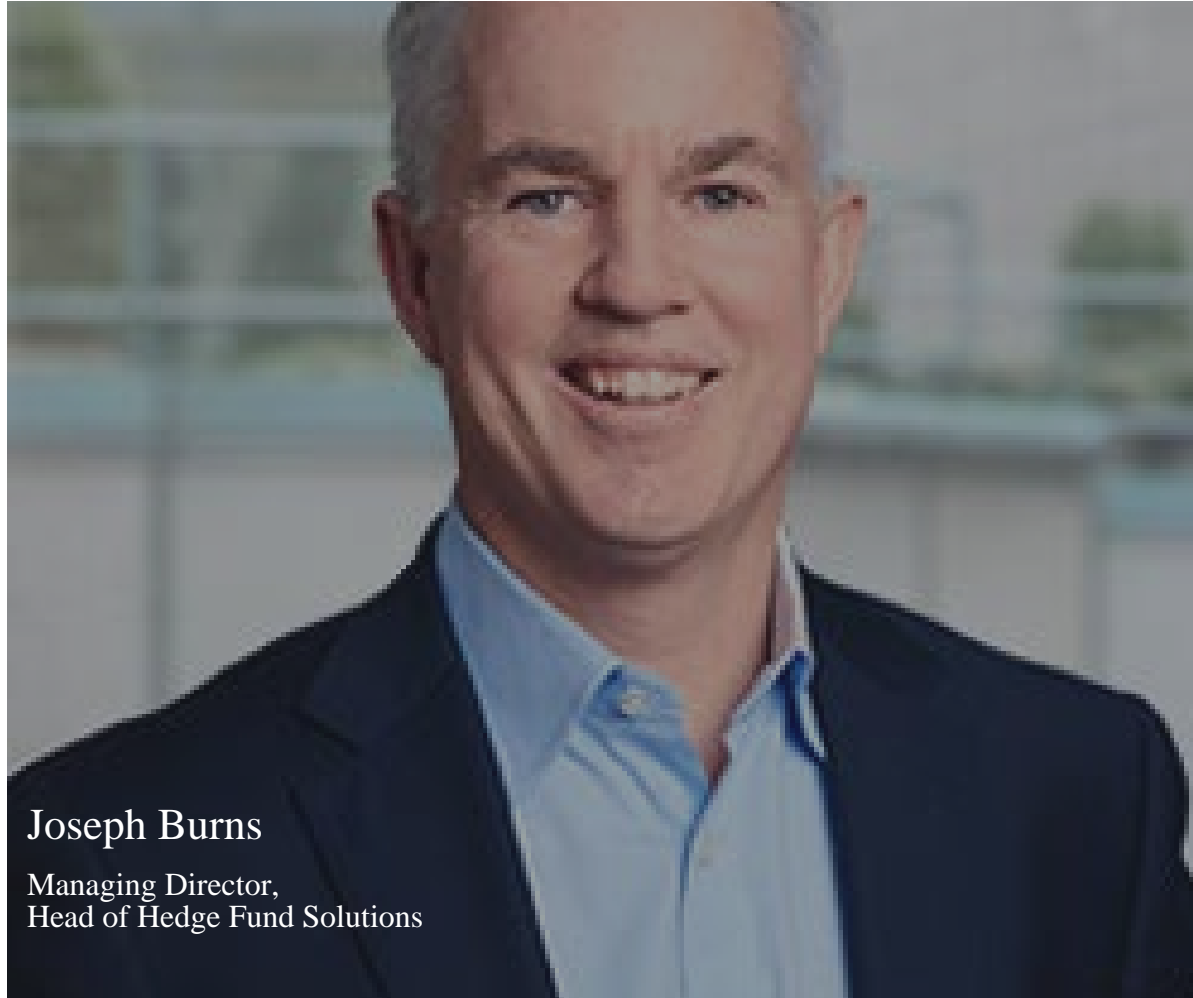
Nick Veronis

Co-Founder & Managing Partner,
Head of Research & Due Diligence



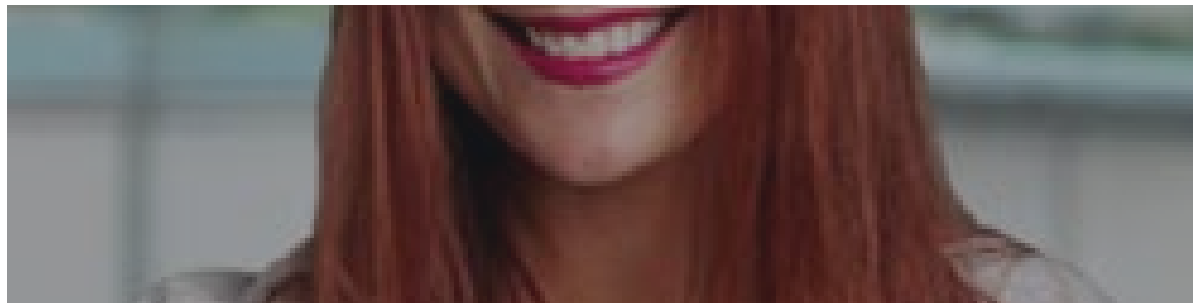
Kunal Shah

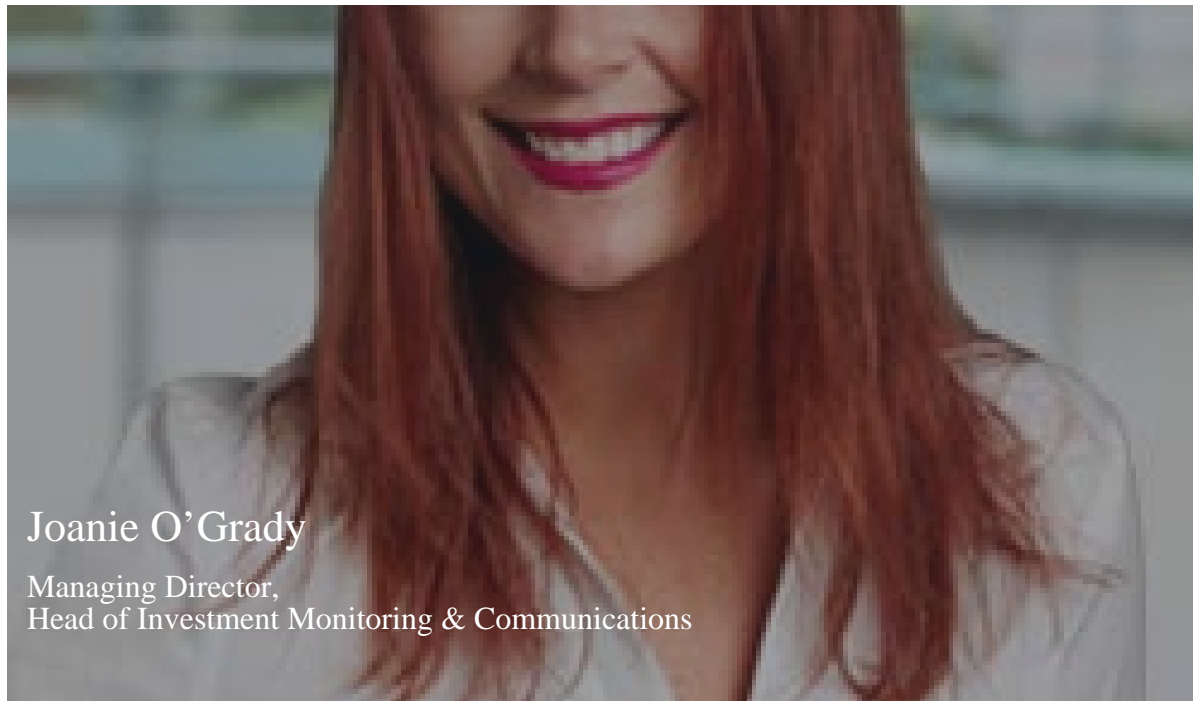
Managing Director,
Head of Private Equity Solutions



Joseph Burns

Managing Director,
Head of Hedge Fund Solutions





Joanie O'Grady

Managing Director,
Head of Investment Monitoring & Communications

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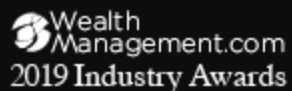
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