

## UTILIZING ALTS

### AIK2 HELPED MG&A WEALTH ADD ALTERNATIVE INVESTMENTS TO ITS ROSTER OF AVAILABLE STRATEGIES

MG&A decided to create a trust to allow clients to access alts at lower minimums. Their insurance carrier initially quoted a \$10k premium for risk and lack of liquidity.

Here's how AiK2 stepped in. We advocated for the advisor by engaging with underwriters at the carrier. Our team explained the single purpose entity structure of the trust and how the vehicle operated, and the carrier then realized that no new E&O risk was presented, saving the advisor \$10k annually. Without AiK2's RIA and investment expertise, as well as insurance knowledge, this wouldn't have happened.

**“Other brokers would have simply accepted the risk and the \$10k premium. AiK2’s knowledge of the insurance landscape saved us money and allowed us to expand our service offerings with a unique strategy in a competitive marketplace.”**

**- Todd Battaglia, President & CEO, MG&A Wealth**

## Results:



**Expanded insurance coverage**



**MG&A lowered** investment minimums for alts



**Decreased** risk without a premium



MG&A provided clients with **liquidity**

### About MG&A Wealth

MG&A Wealth is one of the leading wealth management firms in the nation. It currently manages over \$800M+ in assets.

