In early 2022, Advisor Group announced its partnership with CAIS, an alternative investment platform designed to help you meet the needs of high-net-worth clients.

After a successful pilot, CAIS will be available to all Advisor Group financial professionals on April 3rd.

Learn More at Upcoming Overview Sessions

Find out how to use the platform to address complex client needs. Also discover how CAIS IQ can help you learn faster, remember longer, and potentially improve client conversations.

Introduction to CAIS	**CAIS IQ & Transaction Overview**
Wednesday, April 5 3:00 p.m. ET	Tuesday, April 11 2:00 p.m. ET
Register Now	Register Now

The CAIS platform provides access to alternative investment solutions for your high-net-worth clients.

- Products include private equity, hedge funds, and more.
- All required training, paperwork preparation, and transaction review by Sales Supervision will be completed within the platform, as well as investment life-cycle management.

Beginning April 3, access CAIS through single sign-on:

- FSC, Royal Alliance, SagePoint Financial, Woodbury Financial: visit Advisor Portal, under Launch Apps.
- Securities America: visit FrontPoint.
- Triad: visit FrontPoint.

If you have questions, contact WM_ProductManagement@advisorgroup.com or Jim Ranweiler at james.ranweiler@AdvisorGroup.com.