

You built this practice on trust. *Don't let the infrastructure gap be the thing that ends it.*



The market for alternative investments has shifted permanently. Your clients know it. Your peers know it. The question is no longer whether to build an alternatives program, it's whether your process is built to last.

THE FIVE FORCES RESHAPING YOUR PRACTICE. WHICH ONE ARE YOU?

You already sense all of this. *You just haven't named it yet.*

- 1 Your best client asked about private credit last quarter.**
You gave a thoughtful answer. You're not entirely sure it was defensible.
- 2 A consolidator made an offer. You declined.**
But it made you wonder how long independence is the easier path.
- 3 Your last compliance review left a thin file.**
The due diligence was sound. The documentation didn't show it.
- 4 A peer at a conference had a full alts infrastructure.**
Built, documented, running. You were building yours in your head.
- 5 Your model portfolio still looks like 2014.**
Your clients have evolved. Your construction framework is catching up.

*The gap isn't knowledge.
You have the knowledge.
It's infrastructure.
And infrastructure is buildable.*

Four honest portraits. *One of them is you.*

The Founder

You are the firm. Your clients trust you specifically. Every alt position lives in your head — and you know that's the problem.

If this is you... read on

The Growth Builder

You've added ten products in three years. Your process hasn't kept pace. You're fast. You're not entirely sure you're defensible.

If this is you... read on

The Portfolio Craftsman

You love the construction problem. You've moved well beyond 60/40. But illiquid assets in a spreadsheet-managed book is a risk you feel but can't quantify.

If this is you... read on

The Operations Guardian

You're the one making sure the firm doesn't blow up. You know exactly how thin the documentation is. You're the only one who loses sleep over it.

If this is you... read on



What altMAPS makes possible



NOT A PLATFORM. NOT A CONSULTANT. SOMETHING DIFFERENT.

altMAPS isn't a product. It's institutional infrastructure.

Not a fund platform

altMAPS doesn't pick investments or approve managers. Your investment decisions stay yours.

Not a TAMP

altMAPS doesn't replace your discretion or your client relationships. You remain the advisor of record.

Not a compliance vendor

altMAPS doesn't file your paperwork. It builds the documented process your compliance rests on.

THE altMAPS DISCIPLINE

Three disciplines. One operating system. Yours to own.

Governance

Screening criteria, due diligence protocols, and approved list governance — built on documented methodology. The backbone your investment process runs on — designed to support regulatory defensibility. Not in anyone's head. In a file.

Construction

A construction methodology for integrating alternatives deliberately into your portfolio approach - not bolting them on. The RIA applies the framework to its own decisions, with allocation discipline, liquidity tiering, and rebalancing logic built in.

Oversight

Sponsor and strategy monitoring frameworks, client-level review cadence, and a documented IC process the firm runs on a defined schedule. Issues surface early. The file is always current.

WHY THIS MATTERS NOW

The wirehouses figured this out a long time ago.

Their advisors don't build governance from scratch — they inherit it. You chose independence precisely because you didn't want inherited constraints. altMAPS gives you the same institutional process discipline without the institutional overhead.

Same discipline. Same defensibility. Independence intact.

Take a free self-assessment

Complete our complimentary online assessment to benchmark your alternatives program against institutional best practices.

Once complete, we'll review your results with you, explore your firm's goals and challenges, and discuss potential next steps if additional support is warranted.

Confidential. Complimentary. No obligation.

Access the quick assessment:
www.altMAPS.com

FIVE SERVICE LEVELS. ONE FRAMEWORK. ESSENTIALS > ENTERPRISE.

The advisors who thrive in the next decade won't be the ones who avoided alternatives.
They'll be the ones who built the process to do it right — and can prove it.

Contact Us:

Steve Ogrin: Steve@altMAPS.com
Rizwan Ibrahim: Rizwan@altMAPS.com

www.altMAPS.com



altMAPS (Managed Alternatives Program Services) is not a registered investment adviser. altMAPS does not provide investment advice, manage client assets, or make investment decisions. All investment decisions remain solely with the registered investment adviser. altMAPS methodology frameworks are designed to support, not replace, the RIA's own investment judgment. Adoption of altMAPS infrastructure does not guarantee regulatory compliance or examination outcomes. Alternatives investing involves material risk, including illiquidity, loss of principal, and limited regulatory oversight. Consult qualified compliance counsel regarding your specific obligations.