

# TIFIN Private Markets

## Case Study: Using TIFIN Private Markets to Convert High Net Worth Clients

By offering a key client lower fees and minimums while streamlining the onboarding process, learn how one advisor was able to make an impact with a high net worth client.

Claudia\* is a financial advisor on Long Island who has been content with her advisory practice which she took over from her family about 10 years ago. While she is comfortable, she wants to make her own mark and realizes that the best way for her to expand her practice is to engage with a greater number of high net worth (HNW) and ultra high net worth (UHNW) clients.

With that in mind, she decided to explore pivoting her practice into areas where she could add significant value with HNW and UHNW clients. She became aware that UHNW clients hold an average of 50% of their assets in private markets, and it was time for her to be able to provide access to this asset class.

It was then that Claudia decided to book a demo

with TIFIN Private Markets. She learned that while access to private markets used to be prohibitive and limited to a select few, new fund structures and lower minimums were expanding that access.

The platform's direct access model also meant that she would save her clients on access or brokerage fees. Further, she enjoyed the way the platform presented each fund with critical research and the information she needed to feel educated and confident to make recommendations to her clients. The TIFIN in-house research team reviews hundreds of funds each quarter and even engages an outside provider for operational due diligence, saving Claudia time and effort.

### Benefits Within TIFIN Private Markets



Enables allocators to research and select from a diverse network of managers and their alternative investments.



Our dedicated team is available for any support you may need along the way. We offer exclusive access to an evolving content library including white papers and market insights.



Our tenured research team practices a disciplined approach in selecting each manager on the platform. Each manager is additionally reviewed by an independent third-party research consultant.



Manager evaluation is facilitated through custom insight on each manager, including firm overview, track record, agency rating and access to reporting.

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Claudia decided to approach Cal\*, one of her long-term clients who was in the AUM bracket where she had been seeking to grow her impact. During Cal's annual review, she decided to come prepared with some options she found within the TIFIN Private Markets platform in private equity and real estate, areas where Cal had shown an interest in the past.

She was able to put together a proposal and discuss how with the 60/40 allocation model becoming obsolete, she could help her client gain greater access to uncorrelated returns, increased portfolio diversification, inflation hedging, and greater upside potential in early stage companies. TIFIN Private Markets' recommendation engine suggested how much Claudia should allocate to private markets and different investment styles and even provided fund ideas.

The platform made it easy for her use her CRM to pull in client data, custodian accounts, client portfolios and guide her through subscription process. When Cal came back a year later with the desire to allocate to another two funds, his paperwork was reduced based on the platform recognizing he was a repeat customer.

Ultimately, Claudia was able to engage additional HNW and UHNW prospects by becoming knowledgeable in the space and coming to meetings with proposals that included private market opportunities. And she was able to do so without putting an unnecessary burden on her team through the easy-to-use TIFIN Private Markets platform.

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**Learn more at [TIFINprivatemarkets.com](https://www.tifinprivatemarkets.com)**

\*A persona created for illustrative purposes.

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