

# Working with Ares Wealth Management's Financial Advisor Solutions Team

## The FAST Mission

At Ares Wealth Management Solutions, we champion and support the growing democratization of private markets investments. To advance that goal, we seek to empower advisors to incorporate these important asset classes into their practice.

Our industry-leading Financial Advisor Solutions Team (FAST) creates educational resources and investment tools—leveraging Ares' institutional-caliber content and analytics—to

help financial advisors and their clients make knowledgeable investment decisions. To help deliver on that, FAST provides unique insights through:

**Education:** Asset class, asset allocation and objective-setting consultation

**Analysis:** Analytics to support optimal sizing and funding of private markets investments within total portfolios

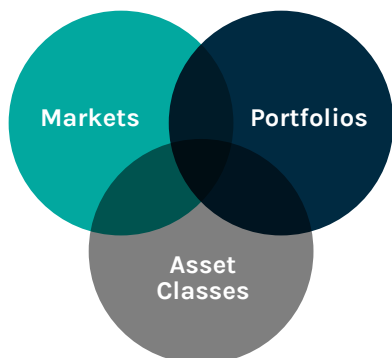


“Our goal is for Ares to be the first call that advisors make when investing in private markets. To help deliver on that, FAST provides research, education and tools that demonstrate the diversification and performance benefits alternatives can offer within a broader portfolio.”

– FINANCIAL ADVISOR SOLUTIONS TEAM (FAST)

## What to Expect

FAST provides insights and thought leadership at the intersection of markets, asset classes and portfolio construction.



### Our proprietary educational content includes:

- *Private Market Insights* newsletter, which dives into recent research from the team
- White papers and articles
- Asset class primers
- One-on-one meetings
- Industry conferences and events

### Recent topics include:

- Public vs. private markets investing
- Private markets asset class education
- Recent market shifts
- Aligning investment strategy with goals-based
- Financial Planning

# Customized Analytics and Tools

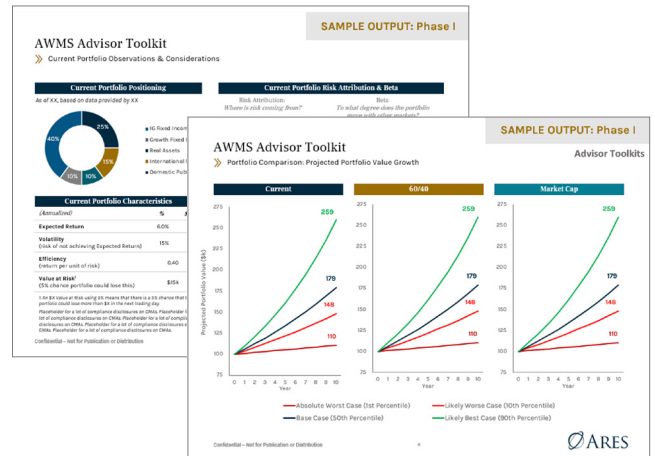
While portfolio analysis is standard in the industry, it tends to predominately focus on public markets investments. Additionally, this type of analysis is rarely accompanied by insight on how best to use their output to make well-informed decisions.

For select advisors, FAST offers analytics that are tailored to the private markets, and delivered with the insights, inquiry and discussion needed to bring the numbers to life.

## Examples of our custom analytics include:

- Portfolio consultation
- Quantitative analysis for optimizing asset allocation
- Private markets funds analysis
- Macro views & market outlook

## Advisor Toolkits



## A more human approach to private markets investing

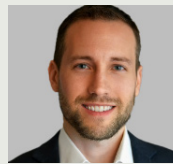
Since early 2022, our highly skilled team has been offering personalized guidance to expand the understanding of private markets investing. This dedicated group of private markets experts, led by Carlin Calcaterra and Brendan McCurdy, is passionate about the benefits of these important asset classes. The extended team provides product-agnostic education and hands-on support for every type of investor. Our goal is to help you feel confident incorporating private markets investments into any portfolio.

## AWMS FINANCIAL ADVISOR SOLUTIONS TEAM



### Carlin Calcaterra

Principal  
Financial Advisor Solutions Team



### Brendan McCurdy

Managing Director  
Financial Advisor Solutions Team

## Get in touch

To inquire about FAST or to schedule an introductory meeting to discuss your topics of interest directly, please contact your regional sales director or email us at [awms@aresmgmt.com](mailto:awms@aresmgmt.com).

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#### Important Information:

This material is for informational purposes only and is neither an offer to sell nor a solicitation to purchase any related securities. Investing in private markets investments involves a high degree of risk including, but not limited to:

- Risk of substantial loss of principal - direct investments in private companies and investments, involve a high degree of business and financial risk that can result in substantial losses
- Illiquidity risk - investments are not listed on any securities exchange and may not be readily liquidated, therefore it may be impossible to get your money back
- Valuation risks - the risk that the securities are valued at prices the seller is unable to obtain upon sale due to factors such as incomplete data, market instability, human error, or no readily available market quotations, and other factors
- Risk related to private companies - these companies are generally not subject to SEC reporting requirements, are not required to maintain accounting records in accordance with generally accepted accounting principles and are not required to maintain effective internal controls over financial reporting. As a result, there is the risk that investors may invest based on incomplete or inaccurate information, which can adversely affect performance. Private companies may also have limited financial resources, shorter operating histories, more asset concentration risk, narrower product lines and smaller market shares that can make such private companies more vulnerable to competitors' actions and market conditions

Financial advisors must carefully consider the risks and other suitability details in determining appropriate investments for their individual clients' portfolios.

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