

# Spend time with clients, not alts paperwork.



## RIA Case Study

### Overview

Insight Investment Advisers, a registered investment adviser firm based in Kansas City, focuses on helping investment owners retire via passive income and tax advantaged investment strategies. The SEI Access™ platform has helped them significantly reduce the time it takes to complete alternative investments and allow them to spend more time with clients.

### Challenges

As a RIA firm heavily focused on real estate investment strategies, the team at Insight Investment Advisers was often bogged down with alternative investment paperwork. A typical DST application is a non-fillable PDF requiring multiple data points to be tracked down from a variety of sources. The team had to pull documents from each source, create a fillable version of the PDF, manually look up investor information in their CRM, and key it in each time. With several investments each week, this process took up hours of their day. To make matters worse, the paperwork often ended up with errors from the manual process resulting in high not-in-good-order (NIGO) rates.

### Solution

Insight Investment Advisers began using the SEI Access platform in early 2021. They immediately saw improvements in the alternative investment process with significantly less time required to complete DST paperwork. The majority of the DST sponsors and alternative investment fund managers they worked with were available on SEI Access, allowing them to access subscription documents for the latest funds directly within the platform. The intuitive workflow allowed the team to complete documents in minutes, not hours or days. The platform's integration with Redtail CRM allowed them to pull investor data directly into the investment workflow. Plus, the data verification checks throughout the process allowed them to reduce NIGO paperwork to nearly zero.

### Result

Insight Investment Advisers has seen their client's investments in 1031 Exchanges continue to grow thanks to the ease of use and product availability on the platform. In the first half of 2024 alone, they have invested more than **\$1.6M across 7 different alternative investment managers**. Investments for repeat investors can be made in **less than 5 minutes** and allows them to get clients allocated sooner.

**\$33.8M**  
transacted

**300+**  
subscriptions

**20**  
sponsors

**56**  
offerings\*

**Contact us to  
learn more:**

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*"The ease of use and product selection on the SEI Access platform far exceeds the platforms I've considered. I'm able to complete DST transactions in under 5 minutes. In addition to the easy-to-use technology, the SEI Access team has always been very responsive and provided great customer service."*

– Josh Wright, President, Insight Investment Advisers