



Working with RIAs

Altera is a leader in the lower-middle private markets, while applying a “real economy” lens to our selection of investment opportunities. As a trusted partner, Altera provides many of the benefits of a platform, but with the alignment of a partner.

Better Access leads to Better Portfolios

Altera leverages its access to the lower and lower-middle markets to bring the independent wealth community alternative investment funds and products at institutional terms and conditions.

Altera specializes in real assets, tactical private equity opportunities, and impact investments driving an evolving menu of alternative investment strategies, helping financial advisors curate the most appropriate allocations based on their client mandates.

Diligence and Alignment

We are not a platform in the traditional sense – and that’s a good thing – as we can be hyper selective of managers and investment sponsors without softening our standards in the interest of having investment breadth.

Altera prioritizes giving financial advisors the confidence that comes with independent due diligence on the funds and strategies they select for their clients. Since our founding, Altera has made operational due diligence the foundation of how we approach manager selection in the small middle market – as it has increased importance there.

Reporting and Communication Made Easier

Altera is committed to liberating financial advisors through a streamlined process that makes it simple to allocate to small market alternative investments and manage investments at scale.

We have a built-in subscription process with electronic subscription documents, AML/KYC smart logic and e-signature capabilities, helping to reduce the cumbersome nature of the alternative investing experience.

Altera’s streamline transaction process and tools include:

- Automated position reporting
- Asset recognition with major custodians including Schwab, Fidelity, and TD.
- Data integrations with third-party reporting providers
- Streamlined capital call and distribution workflow
- On-call client-service support team