



Mount Yale Joins iCapital Marketplace, Simplifying Access to Alternative Investment Opportunities

Partnership offers opportunity for investors to access private equity via Princeton Everest Fund

MINNEAPOLIS, MN, UNITED STATES, October 5, 2023 /EINPresswire.com/ -- Mount Yale Capital Group, LLC, announced today The [Princeton Everest Fund](#) is now available on iCapital Marketplace, the all-digital investment platform connecting wealth managers with the broadest selection of alternative investments from the world's leading asset manager.

iCapital's end-to-end technology platform streamlines and automates the alternative investing process, from subscriptions and capital calls to reporting. By adding the Princeton Everest Fund to Marketplace, iCapital continues to expand its offering of top-tier investment options, empowering advisors and their high-net-worth investor clients with more choice and convenience.

Demand for access to private equity investments has accelerated over the past few years as investors are seeking diversification and return opportunities beyond traditional equity and fixed income. By identifying, screening, and curating a dynamic mix of distinctive private equity and credit portfolios, the Princeton Everest Fund provides innovative access built to deliver long-term value.

"Direct access to industry leaders in private equity and credit is generally inaccessible to individual investors," said John Sabre, Mount Yale's CEO. "We provide investors with private equity and credit exposure to some of the largest and most tenured managers at low investment minimums, and we are excited to reach more investors by offering our strategies on the iCapital Marketplace platform."

About Mount Yale Capital Group

Mount Yale's subsidiaries serve institutional and individual investors. Mount Yale's two affiliated investment advisors, Mount Yale Investment Advisors, LLC and Princeton Fund Advisors, LLC, advise on nearly \$3 billion of assets (as of 12/31/2022).

For more information, visit thepefund.com

All investments involve risk, including possible loss of principal.

Investors should carefully consider the investment objective, risks, charges and expenses of the Princeton Everest Fund. This and other information is contained in the prospectus and should be read carefully before investing. For a prospectus, please call the Princeton Everest Fund at 1-888-868-9501. The Fund is distributed by Northern Lights Distributors, LLC, member FINRA/SIPC. Northern Lights Distributors, LLC and Princeton Fund Advisors, LLC are not affiliated.

Closed-Funds involve risk including the possible loss of principal. Many of the Underlying Funds may have limited operating histories and the information the Fund will obtain about such investments may be limited. As such, the ability of the Advisor to evaluate past performance or to validate the investment strategies of such Underlying funds will be limited. The Advisor has completed its creation to select the Investment Funds as opportunities arise. The transfer ability of Shares is subject to certain restrictions. The Fund is a non-diversified, closed-end management investment company designed primarily for long-term investors and is not intended to be a trading vehicle. An Investor should not invest in the Fund if the investor needs a liquid investment. The Fund may, from time to time, offer to repurchase Shares pursuant to written tenders by Investors. Repurchases will be made at such times, in such amounts and on such terms as may be determined by the Board, in its sole discretion.

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Relationship Between iCapital and Underlying Fund GPs (defined as Underlying Fund GPs of products offered on the iCapital platform where iCapital is acting in an investment advisor capacity). iCapital is not a current client of, or investor in a private fund advised by, the Underlying Manager; however, iCapital sponsors and manages the Access Fund, which is or is expected to be an investor in the Underlying Fund, a private fund managed by the Underlying Manager. Prospective investors in the Access Fund should be aware that, as a result of the relationship between iCapital and Underlying Fund GPs and its affiliates created by the access fund arrangement discussed herein (1) iCapital is financially compensated for the arrangement by payment of certain management fees (which are calculated as described in “SUMMARY OF PRINCIPAL TERMS OF THE ACCESS FUND – Management Fee” or corollary section of the Access Fund Offering Memorandum) and, if applicable, certain fees for placement of investors in the Access Fund or the Underlying Fund (which are typically calculated as a percentage of an investor’s aggregate commitment to the relevant fund), and (2) the existence of such compensation may create conflicts of interest whereby, for example, iCapital may be more inclined (a) to establish access funds (including the Access Fund) (i) for investment in underlying funds (including the Underlying Fund) sponsored or managed by the Underlying Fund GPs and its affiliates, than for investment in investment funds sponsored or managed by other fund managers, and (ii) upon terms and conditions more favorable to the Underlying Fund GPs and its affiliates than iCapital would otherwise agree to in the absence of such compensation; (b) to make positive statements about the Underlying Fund GPs and its affiliates in order to encourage investors to make a larger commitment to the Access Fund, thereby increasing the fees paid to iCapital, or (c) to vote or exercise consent rights in respect of interests in underlying funds (including the Underlying Fund) held by access funds (including the Access Fund) in a manner more favorable to the Underlying Fund GPs and its affiliates than iCapital would otherwise vote or exercise in the absence of such compensation.

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