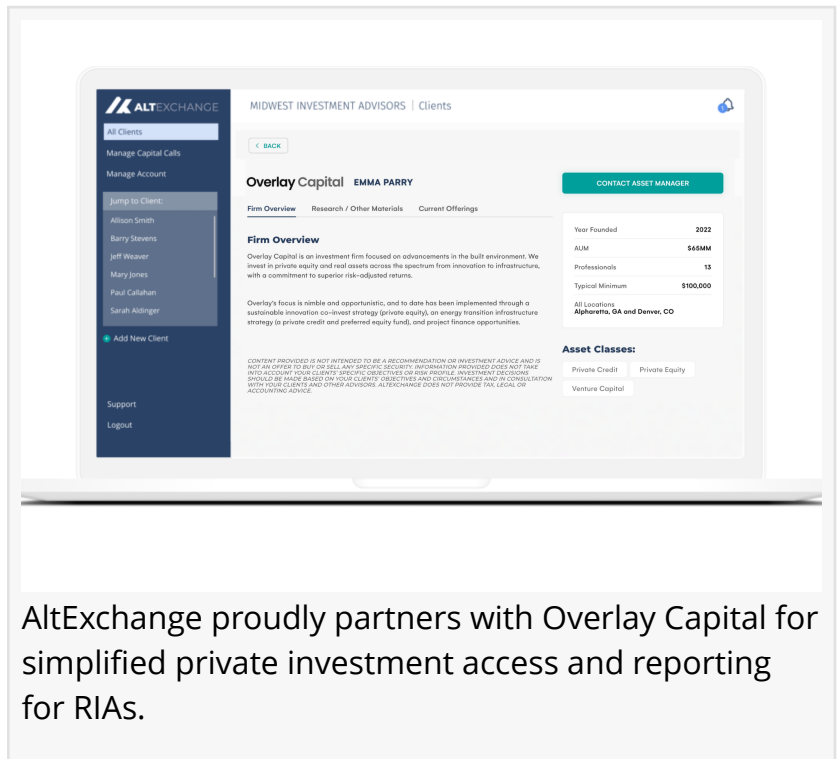


Overlay Capital & AltExchange Partner, Enabling RIAs With Access and Reporting to Boutique Private Investment Strategies

RIAs and clients can now access unique exposures across private markets, from innovation to infrastructure, and automated reporting powered by AltExchange.

NEW YORK CITY, NEW YORK, UNITED STATES, May 29, 2024

/EINPresswire.com/ -- Today, [Overlay Capital](#) and [AltExchange](#) announce a strategic partnership to provide RIAs access to Overlay Capital's range of private investment opportunities with secular themes including sustainable innovation, supply chain resilience, and energy independence, and next-level comprehensive, automated digital reporting for all investments.



AltExchange proudly partners with Overlay Capital for simplified private investment access and reporting for RIAs.

This partnership allows RIAs to diversify their clients' portfolios with access to unique alternative investment opportunities without management and reporting complexities. AltExchange's award-winning automation technology allows advisors to provide an unmatched alternative investment experience for their clients and differentiate with true transparency and insights.

With AltExchange, Overlay Capital's RIA partners and clients can now experience:

- Real-time reporting and consolidation of Overlay Capital investments.
- Historical reporting on existing investments.
- Automatic collection of investment tax documents (K1s, 1099s).
- Integrations with existing wealth management systems.

Jeff Sheridan, Managing Partner at Overlay Capital said:

"Overlay Capital is all about empowering RIAs with unique and opportunistic private investment

opportunities that their clients crave, minus the usual operational hassles and hurdles that come with alternatives. We're thrilled to offer RIAs and Family Offices our differentiated fund strategies that focus on bespoke opportunities in the built environment. We are elevating that commitment with a simplified, streamlined reporting experience that brings efficiencies to our investors and their advisors. AltExchange is our partner and resource in making investing in and reporting on sustainable private investments a breeze for advisors and their clients. Implementing this partnership allows advisors and investors to spend less time administering and therefore leaves more room for them to deploy capital into the opportunities, big and small, that best serve their investment goals."

Kareem Hamady, CEO at AltExchange said:

"AltExchange helps eliminate the barriers between asset managers of private investments and RIAs. We're thrilled to partner with Overlay Capital to make accessing, managing, and reporting on their investments an effortless experience for RIAs. With AltExchange, Overlay Capital can now offer clients automated data aggregation, reporting, and direct integrations with leading wealth management systems for a comprehensive overview of their clients' wealth."

For more information about Overlay Capital, please contact Emma Parry at eparry@overlaycapital.com.

To automate alternative investment management, please reach out to hello@altexchange.com.

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AltExchange
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This press release can be viewed online at: <https://www.einpresswire.com/article/715330461>

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