

# Click Capital Markets Partners with Ask Clio

*Click Partners with Ask Clio to Offer AI Backed Investor Education and Support on New Issuance Products*

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*Scott Coyle*

today announced a strategic partnership with Ask Clio, a cutting-edge AI platform, to power a new conversational support experience for retail investors engaging in public offerings. The integration brings Ask Clio's large language model (LLM) technology directly into Click's platform, delivering real-time, intelligent responses to questions about IPOs, SPACs, Unit Investment Trusts (UITs), Closed-End Funds (CEFs), Fixed Income, and more.

Click's clients can now access a personalized AI assistant named “Clicky” that replaces outdated static FAQs and help

files. Clicky is context-aware, trained on capital markets documentation, and capable of summarizing complex regulatory filings like S-1s to help investors compare offerings, understand structures, and make informed decisions. It is also multilingual, allowing users to ask questions in their native language. Ask and receive answers in the same language, tailored from Click's proprietary data and workflows.

“This is a leap forward for how retail investors engage with new issuance products,” said Scott Coyle, CEO of Click Capital Markets. “Ask Clio's AI allows us to deliver accurate, contextual answers instantly, even across multiple languages. It helps our clients support end users more efficiently, while giving investors the clarity and confidence they need to participate in these offerings.”

The integration is now live across Click's web platform at [web.click.markets](https://web.click.markets), where investors can create a free account and try the experience. Broker-dealers can also work directly with Click to offer their clients access to IPOs, follow-ons, and fixed income products, now enhanced with AI-powered education and support.

“At Ask Clio, we're focused on using AI to simplify financial complexity,” said Davis Gaynes, CEO of Ask Clio. “Click Capital Markets is the ideal partner because of their global retail reach and their deep focus on structured products and public offerings. Together, we're making these markets more transparent, accessible, and navigable for everyone.”

### About Click Capital Markets

Click offers an API designed to give U.S. and foreign brokerage firms access to a wide variety of U.S. registered new issue capital markets products, including IPOs, Preferreds, CEFs, Secondary Offerings, UITs, CEFs, Fixed Income, Structured Products and Alternative Assets.. For more information, visit [www.click.markets](http://www.click.markets).

### About Ask Clio

Ask Clio is an AI-powered financial assistant platform built for fintechs and financial institutions. Designed to simplify access to complex financial information, Ask Clio uses a proprietary LLM to deliver personalized, compliant, and explainable answers that improve user experience and operational efficiency. Learn more at [www.askclio.ai](http://www.askclio.ai).

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