



Data, Education & Visibility Opportunities Guide

ALTERNATIVE INVESTMENT SPONSORS & SERVICE PROVIDERS

BLUEVAULT™

Clarity Through Data. Confidence Through Education.

WHO WE ARE



This guide outlines the **data, education, and visibility opportunities** available through Blue Vault to help your firm connect with advisors, showcase your expertise, and stay ahead in a rapidly evolving alts landscape.

Since 2009, Blue Vault has been committed to making alternative investments more transparent, more accessible, and more actionable for the wealth management community.

We were founded on the belief that **transparency, education, and access** are essential for advisors to confidently incorporate alternatives into their practices—and for firms to build trust and credibility in the marketplace.



Data

Today, our platform supports some of the **largest global financial institutions** and thousands of wealth advisors with **objective performance data** across nearly 300 alternative investment funds, including nontraded REITs, BDCs, interval funds, tender offer funds, preferred share stock, private equity, private credit, and an expanding array of private offerings.

What once lived deep in financial statements and SEC filings is now delivered through **easy-to-use research reports and a searchable database**, helping advisors compare offerings, evaluate risk, track performance and educate their clients.

FUND CATEGORIES & ASSET CLASSES CURRENTLY COVERED

- Nontraded REITs (Active & Full-Cycle)
- Nontraded BDCs
- Interval Funds
- Tender Offer Funds
- Nontraded LLCs
- Nontraded Preferred Stock
- Hedge Fund Asset Class
- Private Credit Asset Class
- Private Equity Asset Class
- Private Real Estate Asset Class



Education

But data alone isn't enough. That's why we've also built a growing advisor education platform—driven by timely content, interactive webinars, and thought leadership created with input from our [Educational Advisory Board](#), now in its second year. This board includes professionals from leading alts sponsors, service providers, broker-dealers, and advisors—ensuring everything we create meets real-world needs.

DATA OPPORTUNITIES

Data That Drives Visibility and Strategy

Our data gives you access to robust insights on nearly 300 alternative investment funds—without pay-to-play inclusion—allowing you to benchmark your offerings, track competitor performance, and identify market trends that shape strategic decisions.

We provide unbiased coverage, ensuring your firm is accurately represented alongside peers and competitors in the most trusted and comprehensive alts data set available.

How Alts Sponsors Use Blue Vault Data

COMPETITIVE INTELLIGENCE

See how your fund compares to others in your category. Evaluate performance metrics, distribution trends, and investor flows.

PRODUCT DEVELOPMENT

Use industry-wide data to identify gaps, track demand, and validate new product ideas.

SALES SUPPORT

Arm your distribution team with real-time stats and performance comparisons to support their conversations with advisors.

MARKET POSITIONING

Understand how your fund ranks across key indicators—so you can refine messaging and highlight your differentiators.



Data Packages

STARTING AT \$18,000/YEAR

Stay on top of market trends with real-time fund reporting, including the current quarter, previous 12 months, and the future 12 months. Data is for your firm's internal use only.

STARTING AT \$20,000/YEAR

Access years of performance and operational data to support trend analysis and strategic planning. Historical data is only available as an add-on to a current data package. Data is for your firm's internal use only.

Custom Analysis

Need tailored metrics? We deliver custom data projects to support internal reporting, executive dashboards, and board-level insights.

[Contact us for pricing.](#)

Why Sponsors Trust Blue Vault



Objective & Unbiased Reporting



No Pay-to-Play Inclusion



Most Comprehensive Alts Coverage in the Industry



Custom Data Projects Available

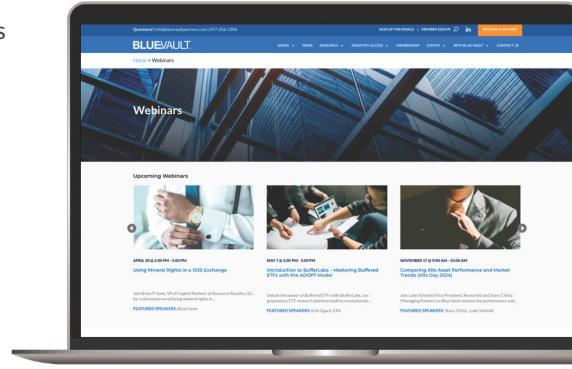
EDUCATION OPPORTUNITIES

Today's advisors are looking for more than product materials—they want to understand the investment philosophy, structure, and differentiators behind each alternative investment offering. Blue Vault provides meaningful ways for your firm to educate advisors, share key insights, and build trust through targeted content and visibility.

ALTS & ANSWERS REGIONAL LUNCHEONS

Connect directly with financial advisors—in their own markets—through Blue Vault's new advisor Alts & Answers luncheon series.

- Events are designed for 25-30 wealth advisors
- Each firm receives:
 - A 12-minute presentation slot + Q&A at the end
 - Direct access to a qualified, regionally targeted advisor audience
 - Branding across event materials and follow-up communications
 - Promotion to thousands of advisors
 - A social toolkit for event promotion
- Luncheons are formatted to include 3 sponsors



Pricing

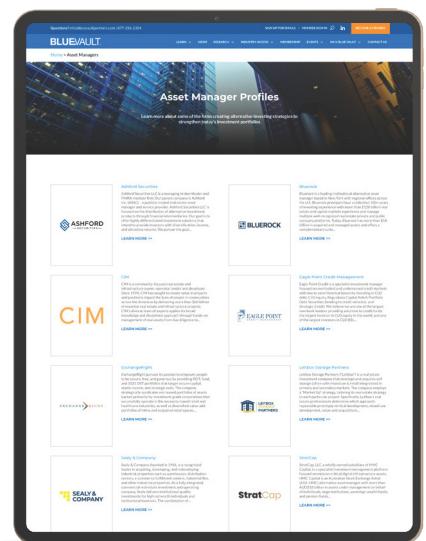
- \$5,000/Sponsor, plus an equal split of expenses (F&B, room rental, AV)

WEBINARS

Share your expertise directly with Blue Vault's engaged advisors through a live, interactive event hosted on Blue Vault's platform. Whether you're unpacking a market trend, explaining a product structure, or offering continuing education, webinars position your firm as a knowledgeable resource.

Live Event Benefits

- Up to 1-hour live webcast
- Moderator, interactive polling, and live Q&A
- Up to 5 downloadable handouts for your attendees
- Post-event survey and lead list



Recording Benefits

- Recording of live event to use in your marketing
- Recorded event featured on Blue Vault website indefinitely for access by Blue Vault members
- One exclusive webinar email sent to the Blue Vault distribution list, plus webinar promotion included in all weekly emails starting one month prior to the event

LinkedIn Benefits

- Two social media posts promoting the webinar

Pricing

- \$100 per advisor attendee
- \$250 per broker-dealer attendee
- \$250 per third party due diligence firm attendee
- Capped at \$5,000 per event



VISIBILITY OPPORTUNITIES

Connect with Wealth Advisors

Blue Vault connects investment firms with engaged wealth advisors through a strategic mix of data-driven visibility, educational content, and credibility-enhancing exposure. Our visibility solutions are built to help your firm stay top of mind, establish trust, and cultivate relationships with advisors who are actively integrating alts into their clients' portfolios.

Whether your goal is to increase brand awareness, educate the advisor community, or deepen engagement with a specific audience, Blue Vault offers targeted channels to meet your objectives.



Stay in Front of Your Audience

Get your firm in front of advisors who are actively researching and adopting alternative investments.

WEBSITE ADS

Capture the attention of 12,000 monthly website visitors, representing 23,000 page views as advisors explore Blue Vault's research, reports, and educational opportunities.

	POSITION 1	POSITION 2	POSITION 3
Dimensions <i>Size in pixels</i>	970x90	970x90 & 300x250	300x250
Location on Website <i>Where ad appears on bluevaultpartners.com</i>	Top of Home Page Top of News Page	970x90 Ad Middle of Home Page 300x250 Ad Bottom of News Page	Bottom 1/3 of Home
	\$2,000/month (no minimum number of months)	\$1,500/month (no minimum number of months)	\$1,200/month (no minimum number of months)

EMAIL ADS

Feature your brand directly in high-engagement weekly emails delivered to 29,000+ subscribers. No minimum number of months required.

- Position 1: 2-3 emails/month | \$1,500/month

AD SPOT #1
(300x250)

- Position 2 (mid-email): 2-3 emails/month | \$1,200/month
- Position 3 (bottom of email): 2-3 emails/month | \$900/month

AD SPOT #2 & #3
(640x100)

BLUE VAULT SOCIAL MEDIA POSTS

Leverage Blue Vault's growing LinkedIn presence of 25,000 average monthly impressions and 400 average monthly clicks to drive visibility and engagement with your firm.

- Long-form: Educational article-style posts | \$500
- Carousel: Multi-image insights | \$600
- Video: Short or long thought leadership or Q&A clips | \$800

BLUE VAULT TAKEOVERS

Amplify your firm's voice and own the conversation for a day on Blue Vault's LinkedIn page, website, and emails with a coordinated content campaign. Ideal for brand recognition before a fund launch or timely insights on current market events.

Includes:

- One-day event of 4 posts on Blue Vault's LinkedIn, and an exclusive email and Q&A spot on our website that is promoted via email and LinkedIn with coordinated support from our team, including all content creation, editing and posting
- Posts prepared in advance for compliance submission
- Performance metrics post-campaign

\$2,500

FIRM PROFILE PAGES

Give advisors easy access to your firm's background, investment approach, and product offerings—right where they're already researching alts. A public Firm Profile Page on Blue Vault's site ensures that advisors can find and learn about your firm and access your educational resources. Profile pages integrate into Blue Vault's searchable ecosystem—placing your firm alongside peers as advisors explore alts investment options.

Includes:

- Firm overview and mission statement
- Logos, product details, and key contacts
- Ability to link to your firm's product info and educational resources

\$3,000

Build Your Firm's Credibility

Position your firm as a knowledgeable resource and trusted player in the alts space.

ADVERTORIAL CONTENT (BLUE VAULT-WRITTEN)

Share your perspective through content crafted by our editorial team, blending thought leadership with educational insights.

Examples:

- [How Alts and Blue Vault Data Propel Creative Capital's Advisory 'Playbook'](#)
- [For Van Leeuwen & Company, Every Client is the Master Painter of their Financial Self-Portrait](#)

Includes interview, copywriting, copy provided for compliance approval, and posting on the Blue Vault website, featured in Blue Vault emails at least twice and promoted via a LinkedIn post once.

\$3,000

FIRM-PROVIDED CONTENT

Distribute non-product whitepapers, market outlooks, or product insights through Blue Vault's channels. Content will be featured/searchable on the Blue Vault website indefinitely.

Content types:

PDFs, infographics, market commentary, educational flyers

\$2,000

INSIDE THE V(ALT)

Record a 10-15-minute Q&A video with our team to highlight your firm's story, philosophy, and alts expertise.

Includes:

- Interview prep and questions
- Video recording
- On-screen branding
- Distribution via Blue Vault email + website

\$3,000 per video

WHO YOU'LL REACH

Empowering Your Firm to Educate, Engage & Grow

Blue Vault's audience is made up of professionals who are actively seeking insights and education to better understand and implement alternative investments. Our platform bridges the gap between alts sponsors and the advisor community through trusted data, credible content, and proven distribution channels.



ADVISORS (58%)

Wealth Advisors—Seeking independent insights to better serve and guide clients through alternative investments

ALTS SPONSORS & DISTRIBUTION PROFESSIONALS (18%)

Using Blue Vault data to benchmark performance, develop products, and support advisor education

INDUSTRY ASSOCIATES (9%)

Service providers and consultants staying informed on alts trends and advisor behavior

BROKER-DEALER HOME OFFICES (5%)

Focused on due diligence, advisor support, and enhancing alts understanding across their networks

REAL ESTATE (2%)

Consultants, analysts, and researchers

MISCELLANEOUS (8%)

A mix of other professionals involved in the alternatives ecosystem

By the Numbers



Website

12,000 average monthly users
23,000 average monthly page views



Emails

29,000 email distribution list
50% open rate



Social Media

25,000 average monthly impressions
400 average monthly clicks



Webinar Program

31 webinars hosted in the last year

Ready to Get Started?

Let's explore how your firm can leverage Blue Vault's trusted data and growing advisor ecosystem to increase visibility, build credibility, and educate advisors.

Contact us today to discuss your goals and customize a strategy that fits.



BETSY RICKS
SVP, NEW BUSINESS DEVELOPMENT

betsy.ricks@bluevaultpartners.com
678-456-4640



KELLI CHITTY
VP, SALES

kelli.chitty@bluevaultpartners.com
404-680-4796

BLUEVAULTTM

info@bluevaultpartners.com | bluevaultpartners.com 877-256-2304
| 407 East Maple Street, Suite 305, Cumming, GA 30040