

# Navigating Alternatives

## Products, Research, Resources, and Support

First Trust Capital Management L.P. (FTCM) provides alternative investment solutions covering a range of asset classes and investment vehicles for all types of investors across the accreditation spectrum. Through our comprehensive platform of products and resources, FTCM seeks to deliver a tailored, streamlined experience to investing in alternatives for the high-net-worth clients of financial professionals, family offices, and institutions.

### Investment Products



### Investment Research

First Trust Alternative Investment Research (“FT AIR”) is the research department within FTCM that is dedicated to sourcing, underwriting, and monitoring alternative investments across all asset classes and strategies. FT AIR has a time-tested track record of sourcing highly-specialized managers that seek to provide superior risk-adjusted returns with a focus on upside opportunity and capital preservation.

### Capital Solutions Group

This team of alternatives specialists within First Trust Portfolios L.P. (First Trust) is focused on the distribution of alternative investments. They work alongside financial professionals to provide access to a range of capabilities and alignment of strengths available through the collaboration of FTCM and First Trust.

**You should consider a fund’s investment objectives, risks, and charges and expenses carefully before investing. Contact First Trust Capital Management at 1-800-988-5196 or visit [www.firsttrustcapital.com](http://www.firsttrustcapital.com) to obtain a prospectus or summary prospectus, if applicable, which contains this and other information about a fund. The prospectus or summary prospectus should be read carefully before investing.**

*Alternative investments may employ complex strategies, have unique investment and risk characteristics that may not be suitable for all investors. An investor should read the applicable offering documents before investing in any private fund.*

The information presented is not intended to constitute an investment recommendation for, or advice to, any specific person. By providing this information, First Trust is not undertaking to give advice in any fiduciary capacity within the meaning of ERISA, the Internal Revenue Code or any other regulatory framework. Financial professionals are responsible for evaluating investment risks independently and for exercising independent judgment in determining whether investments are appropriate for their clients.

### Educational Conferences for Financial Professionals

#### Sales Insight Forums (SIFs)

Conferences held throughout the U.S. that provide timely insights on alternative investments, featuring First Trust’s top speakers who share perspectives on the economy and markets. SIFs provide the opportunity to network with peers, share business building ideas, and earn CE credit from certain presentations.

#### Private Wealth Institutes

90-minute educational sessions focused on alternatives and direct indexing.

#### Alternative Institutes

75-minute educational workshops focused on portfolio implementation ideas.

### Website Tools and Resources

FT AIR Insights

Fact sheets and other literature

- Manager commentary
- Product briefs and sales insights
- Presentations
- Interval fund education course



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