

Inspira Financial's custody services = less friction and more opportunities for growth



Inspira's modern custody platform for alternative investments fosters a complementary relationship with traditional custodians and is powered by more than 20 years of experience that includes

- ✓ 8.2 million individual and institutional clients
- ✓ \$62.3 billion in traditional and alternative assets under custody
- ✓ 41,000 unique alternative assets under custody

The five pillars of our services

1. Optimal functionality for alternative investments

At Inspira, alternatives aren't exceptions; they're a core functionality. Our platform is designed for private equity, venture capital, private credit, hedge funds, real estate, infrastructure, natural resources, and more — all within one comprehensive solution.

2. Full investment lifecycle services

Our services encompass all investment stages: access, onboarding, funding, transactions, settlement, income processing, fees, documentation, and tax reporting. For qualified and non-qualified accounts, we provide custody for assets, full visibility into the portal, and quarterly statements.

3. Technology-enabled trust and transparency

You'll have full visibility into client transactions, account information, and other information because we integrate data with portfolio management systems to provide a streamlined, consolidated view of client accounts.

4. Dedicated support and accountability

With a dedicated relationship manager, you'll experience prompt, knowledgeable support.

5. Smooth onboarding and transition

Our team of professionals ensure smooth and swift transfers of accounts and assets — with asset onboarding in as little as two days. Plus, our defined SLAs eliminate friction and accelerate funding.



Get to know Inspira

Start the journey toward less friction and a smoother path for your clients to invest. Scan the QR code or visit <https://inspirafinancial.com/business/retirement-wealth/alternative-investments>.



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