

NEWS

For Immediate Release

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CoastalOne Launches Digital Alternative Investments Platform, Altigo, Powered by WealthForge

New platform designed to improve the alternative investment experience for Coastal's registered representatives and their clients

WILMINGTON, DE (June 29, 2021) – [CoastalOne](#), an independent broker-dealer (Coastal Equities) and registered investment advisor (Coastal Investment Advisors) based in Wilmington, Delaware, recently rolled out access to alternative investments for all of its 115 advisors and registered representatives, powered by [Altigo](#), an electronic order entry and subscription processing platform from [WealthForge](#).

Alternative investment transactions continue to be lengthy, manual, and paper-laden, leading to NIGO errors, security risks, and operational inefficiencies that drive up costs and discourage wealth managers and investors from considering alternative investments. Altigo is designed to improve the alternative investment experience for CoastalOne's registered representatives and their clients by automating the paperwork process and integrating the subscription process into an advisory firm's existing operational workflow.

"Electronic processing is a primary focus of the CoastalOne technology platform and we're happy to partner with Altigo and WealthForge in establishing a seamless system for our financial professionals and their clients," said Charles Reiling, President and CEO of CoastalOne. "Bill Robbins, Mat Dellorso, Megan Bosch, and the rest of the WealthForge team have created a great offering and we're pleased to offer it to our colleagues here at Coastal."

Altigo provides an intuitive front-end for reps to quickly initiate a subscription through an online intelligent interview and then send to the investor for wet or electronic signature. It fits seamlessly into existing back-office review processes, with no integrations, IT resources, or change management required. On top of

increasing productivity and transparency, Altigo accelerates the investment cycle time with investments completed in 2 days on average instead of 3 weeks, safeguards sensitive investor data and maintains data security standards backed by a SOC 2, Type II report, and helps improve client relationships by providing a fast and easy way to invest in alternatives.

“We are looking forward to Altigo making life easier at the supervision level,” said Francis Skinner, Chief Legal and Compliance Officer of CoastalOne. “The security of straight-through processing and reduction of submissions that are not in good order will greatly reduce regulatory risk and should free up more time for our supervisors to supervise rather than quality control paperwork.”

The Altigo platform is now available to all Coastal financial professionals. Both commission and fee-based products, including real estate, private placements, hedge funds, BDC-type products, and Opportunity Zones, are able to be electronically processed on the platform.

Financial professionals interested in learning more can do so at www.Coastal-One.com.

ABOUT COASTALONE

CoastalOne is located in Wilmington, Delaware, including Coastal Equities, Inc. (CEI), a FINRA registered independent broker-dealer; Coastal Investment Advisors, Inc. (CIA), a SEC Registered Investment Advisor; and Coastal Insurance Services, a division comprised of several insurance agencies providing access to a number of fixed and variable personal lines and business insurance. The goal of CoastalOne is to become the firm of choice for independent financial professionals and their clients, and their mission is to build life-long client relationships from a foundation of personal service, trust, and collaboration. Learn more at www.Coastal-One.com.

ABOUT ALTIGO BY WEALTHFORGE

Altigo is an electronic processing platform from WealthForge designed to improve the alternative investment experience for registered investment advisors, registered representatives, broker-dealers, asset managers, and their investors by increasing productivity and transparency, accelerating investment cycle time, maintaining data security, and improving client relationships. Altigo provides an intuitive front-end for advisors and fits seamlessly into existing back-office review processes, with no integrations, IT resources, or change management required. Learn more at www.WealthForge.com/Altigo.

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