

MINI BRAND STANDARDS: 4Q 2018

Brand standards in just seven slides, including our current brand design, along with new tagline, boilerplate, sales teams' names, and call-to-action.

Latest draft: October 29, 2018.



“No Clear Winner” Provides the Potential to Lead

“ The market is still developing and the two main existing competitors include CAIS and iCapital. Both CAIS and iCapital offer a curated set of retail investment products through user-friendly technology portals. CAIS and iCapital have generally pursued a ‘closed-network’ approach in winning commitments from various wealth managers. No clear winner has emerged. As a combined company, our primary differentiator is an ‘open-architecture’ approach and our goal is to democratize alternative investments. ”

—James Waldinger and Marty Beaulieu, “Artivest Strategic Plan,” March 6, 2018



Positioning a Category Inventor and Leader

“ Companies like Avis and Seven-Up found viable alternative positions to marketing leaders. But most companies don't want to be an 'also ran.' So how do you get to be the leader? It's quite simple—get there first with the most. The essential ingredient in securing the category leadership position is clearly reinforcing the original company business concept over many years. An example would be Xerox's long-running slogans: 'We invented the product.' and 'The document company.' ”

—Al Ries and Jack Trout, *Positioning: The Battle for Your Mind*

Positioning is a runaway bestseller that revolutionized branding and marketing.

In 2009, *AdAge* readers voted *Positioning* as the top marketing book ever published.



Current Brand Design



Our Logo

The Artivest logo combines elements that create an abstract mark that is gem- and mountain-like, symbolizing affluence, durability, elegance, rank, and strength. Our logo is the most visible representation of the Artivest brand.

Aa

ABCDEFGHIJKLMN
OPQRSTUVWXYZ
abcdefghijklmn
opqrstuvwxyz

Aa

ABCDEFGHIJKLMN
OPQRSTUVWXYZ
abcdefghijklmn
opqrstuvwxyz

Our Fonts

Artivest's primary typeface is Gotham. This sans-serif font comes in a range of weights to suit many purposes. This typeface should always be utilized as the primary application in the company's visual identity. Artivest's secondary serif font is Mercury, which is utilized for body copy in the majority of firm communications.



Primary Purple

RGB: 96-88-115
HEX: #605873



Secondary Purple

RGB: 139-135-173
HEX: #8B87AD

Our Color Palette

The Artivest color palette is sophisticated, regal, subtle, and nearly monotone. When laying out documents or illustrations with the Artivest palette, the final product should feel crisp and refined.



New Tagline

ARTIVEST

The premier alternative investment platform.™

Support for “Alternative Investment Platform”

Both Artivest and Altegris have been referred to as “alternative investment platforms” over their histories, stemming back to the inception of Altegris in 2002. “Alternative investment platform” is, by far, the most common phrase used by both the industry and the press to describe the recently-merged firms.

“First with the Most” and “Premier”

Artivest was the first digital alternative investment platform launched to the industry in 2013. Altegris was an early-mover in liquid alternatives in 2002. The adjective “premier,” captures both our history and future. According to Merriam-Webster, the word has two definitions: “1: first in position, rank, or importance. 2: first in time/earliest.”

Takeaways

“Premier” represents Artivest’s history and future aspirations: to become the top-ranked alternative investment platform in the world—surpassing \$250 million in annual revenue by 2022—and serving as the “for-profit utility” for a large industry.



New Boilerplate

ABOUT ARTIVEST

Artivest is a leading provider of alternative funds and technology solutions—having launched the industry’s first digital alternative investment platform in 2013. Our open-architecture platform offers investors and advisors access to institutional-quality alternative strategies, including private equity, hedge funds, managed futures, and real assets. Artivest remains privately held by its employees and outside investors, led by KKR, Thiel Capital, Genstar Capital, and Aquiline Capital Partners. For more information, please visit artivest.co.

Artivest Boilerplate Support

In the “Artivest Strategic Plan,” James and Marty referenced Investnet (NYSE: ENV), a more traditional turkey asset management platform (TAMP), as a model for our alternatives platform. They stated that Artivest’s key strategic advantage and “SWOT” strength is a “true open-architecture model.” We reinforce “open architecture,” by referencing the phrase in our new boilerplate.

Investnet Boilerplate

“Investnet is a leading provider of integrated portfolio, practice management, and reporting solutions to financial advisors and institutions. Our open-architecture platform encompasses a broad range of institutional-quality research, investment products, and advisory resources. The Investnet Platform gives you the tools to conquer complexity and drive your success.”



New Sales Team Names and CTAs

We have reached consensus on renaming our three sales teams, which we are supporting in our new draft boilerplate (prior page) and the call-to-actions (CTAs) below. Emily Glassman provided the following comment, which cemented this group decision: “I would prefer not to utilize the word ‘sales’ if possible, as we are very much in the business of designing solutions.”

OLD TEAM NAME		NEW TEAM NAME
Advisor Solutions Group	→	Advisor Solutions
Business Development	→	Enterprise Solutions
Private Client Group	→	Investor Solutions

New Sample Call-To-Action (CTA) Examples

- For more information on Artivest’s alternative funds and technology solutions, please visit artivest.co.
- To learn more about our alternative investing and technology solutions, please visit artivest.co.
- For more information about our award-winning solutions for alternative investing, please visit artivest.co.

