

Investment Case Study: Service Company



AiK2 is changing how wealth & asset managers buy business insurance while giving advisors access to an exclusive platform that could provide insurance for clients.



Issues



- Most P&C brokers do not understand the specialized needs of wealth managers or their clients
- Buying insurance is unreasonably time consuming and overly complex
- The insurance carriers have overcharged wealth and asset managers because they don't understand the risk associated with these entities

Results



- In less than a year, AiK2 supported the insurance needs of **115+ firms with over \$50B in AUM**
- **AiK2 has reduced premiums across those 115 firms by 21%**
- The P&C insurance platform allows advisors to prospect business owners
- Advisors can better serve their clients and increase/diversify revenue