

# iCapital® and Ares Wealth Management Solutions Expand Partnership

Sep 06, 2022 10:59 AM

Company Release - 9/6/2022

*Provides financial advisors broader access to Ares' alternative investment solutions via multiple distribution channels*

NEW YORK--(BUSINESS WIRE)-- iCapital<sup>1</sup>, the leading global fintech platform driving access and efficiency in alternative investing for the asset and wealth management industries, and Ares Wealth Management Solutions ("AWMS") announced today an expansion of their partnership to provide financial advisors and registered independent advisors with greater access to a broadened menu of alternative investment solutions and a comprehensive set of tools to support the development of client portfolios.

This press release features multimedia. View the full release here: <https://www.businesswire.com/news/home/20220906005219/en/>

AWMS is leveraging the broad capabilities of iCapital's technology to offer investment solutions tailored for the global wealth management community across Ares Management's credit, private equity, real estate and secondaries asset classes.

AWMS will launch an Ares-branded, iCapital-powered site to support the AWMS team as they manage the distribution, marketing and client management activities for various investment solutions, including evergreen, drawdown, exchange and '40 Act funds. With approximately 110 dedicated professionals backed by the scale of the Ares investment management platform, AWMS is one of the most resourced wealth distribution and client service teams in the alternative investment industry.

iCapital will provide feeder fund structuring and management, present the investment for the offering and facilitate the ongoing servicing. This includes investor onboarding, electronic subscription processing, fund servicing and reporting for the life of the investments.

In addition to the launch of Ares' branded distribution and servicing platform powered by iCapital, Ares offers access to a subset of its investment products via the iCapital flagship platform.

"We work tirelessly with our strategic partners to continually elevate the experience for advisors and their high-net-worth clients accessing alternatives investing opportunities," said **Lawrence Calcano**, Chairman and Chief Executive Officer of iCapital. "We are excited to announce our enhanced and evolving partnership that utilizes many of iCapital's capabilities to support AWMS in providing broad access to their diverse investment offerings to the global wealth management community."

"This is a differentiating partnership that advances AWMS' commitment to providing financial advisors and their clients greater access to the breadth of Ares' institutional-quality products and services," said **Raj Dhanda**, Global Head of Wealth Management in Ares Wealth Management Solutions. "In expanding our relationship with iCapital and powered by its leading digital platform, we are further enhancing AWMS' ability to meet

high-net-worth investors' demand for alternatives and better support their desired portfolio outcomes.”

### **About iCapital**

Founded in 2013, **iCapital** is the leading global fintech company powering the world's alternative investment marketplace. iCapital has transformed the way the wealth management, banking, and asset management industries facilitate access to private markets investments for their high-net-worth clients by providing intuitive, end-to-end technology and service solutions; education tools and resources; and robust diligence, compliance, and portfolio analytics capabilities. iCapital's solutions enable organizations to streamline and scale their alternative investments operational infrastructure and to provide access to direct investments and feeder funds at lower minimums through simplified digital workflows. iCapital-managed platforms offer wealth advisors and their high-net-worth clients access to an extensive menu of private investments including equity, credit, real estate, infrastructure, structured investments, annuities and risk-managed solutions. iCapital has been **recognized** on the Forbes FinTech 50 list in each year 2018 through 2022, the Forbes America's Best Startup Employers in 2021 and 2022, and MMI/Barron's Industry Awards as Solutions Provider of the Year in 2020 and 2021. As of July 31, 2022, iCapital services more than US\$136 billion in global client assets, of which more than US\$32 billion are from international investors (non-US Domestic), across more than 1,080 funds. Employing more than 1,000 people globally, iCapital is headquartered in NYC and has offices worldwide including in Zurich, London, Lisbon, Hong Kong, Singapore, and Toronto.

For additional information, please visit the iCapital website at [www.icapitalnetwork.com](http://www.icapitalnetwork.com) | LinkedIn: <https://www.linkedin.com/company/icapital-network-inc> | Twitter: [@icapitalnetwork](https://twitter.com/icapitalnetwork)

See disclosures [here](#).

### **Ares Wealth Management Solutions**

Ares Wealth Management Solutions (AWMS) oversees the product development, distribution, marketing and client management activities of investment offerings for the global wealth management channel. With a team of approximately 110 professionals and backed by the power and scale of the Ares Management platform, AWMS represents one of the most resourced wealth distribution and client service teams in the alternatives industry. AWMS' mission is to provide advisors and their clients access to innovative, solutions-oriented investment opportunities across Ares Management's credit, private equity, real estate and secondaries strategies. Through our range of institutional and retail structures, coupled with excellent client service and educational resources, we help investors diversify their portfolios with private market solutions that seek to deliver consistent, long-term growth.

### **Ares Management Corporation**

Ares Management Corporation (NYSE: ARES) is a leading global alternative investment manager offering clients complementary primary and secondary investment solutions across the credit, private equity, real estate and infrastructure asset classes. We seek to provide flexible capital to support businesses and create value for our stakeholders and within our communities. By collaborating across our investment groups, we aim to generate consistent and attractive investment returns throughout market cycles. As of June 30, 2022, Ares Management Corporation's global platform had approximately \$334 billion of assets under management, with over 2,300 employees operating across North America, Europe, Asia Pacific and the Middle East. For more information, please visit [www.aresmgmt.com](http://www.aresmgmt.com).

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<sup>1</sup> Institutional Capital Network, Inc. and its affiliates (together, “iCapital”)

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Source: iCapital