

The AOG Institutional Fund, AOGFX Celebrates Three Years of Innovative Alternative Investment Solutions

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EINPresswire.com/ -- The [AOG Institutional Fund \(AOGFX\)](#) Celebrates Three Years of Innovative Alternative Investment Solutions



The AOG Institutional Fund, an investment fund seeking to deliver innovative financial solutions, is proud to celebrate its 3rd anniversary last week. Since its inception on December 15, 2021, AOGFX has provided investors with a comprehensive strategy incorporating investments in real estate, private credit & private equity.

Over the past three years, AOGFX has been featured on Nasdaq Times Square, Nasdaq Fund Focus, AICA Alliance, ADISA Focus On Alternatives, and Blue Vault Alts Summit, just to name a few platforms. AOGFX is cementing a reputation as a leading option for investors seeking non-traditional/alternative investments with low correlation to public market volatility and the opportunity for producing both income and long-term capital appreciation. All of this is in a structure, requiring no K-1s, no capital calls, and providing periodic liquidity(1).

A PROVEN TRACK RECORD:

"It has been exciting to watch the steady advancement of the Fund, both in terms of portfolio makeup as well as performance, as we approach the three-year anniversary," said [Aaron Rosen, CIO](#) and Portfolio Manager of the AOG Institutional Fund. "We remain committed to its success as a value-add addition to any equity and fixed-income investor portfolio."

LEADERSHIP REFLECTIONS:

"We are thrilled to celebrate this important milestone for the AOG Institutional Fund," said Frederick Baerenz, Chief Executive Officer. "This anniversary is a testament to the trust our clients place in us and the hard work of our dedicated team. As we look to the future, we remain committed to excellence, delivering innovative solutions that meet or exceed client expectations."

We believe this fund is a key ingredient in helping clients achieve their financial goals, including a work-optional lifestyle.

LOOKING AHEAD:

As the AOG Institutional Fund enters its fourth year, the Fund is poised to continue its growth trajectory and expand its offerings to meet the evolving needs of our investors.

AOG Institutional Fund (AOGFX):

AOGFX is a closed-end interval fund designed to provide exposure to alternative and non-traditional investments through a single point of entry. Interval funds are an increasingly popular vehicle because they solve some of the structural and regulatory limitations associated with private funds while offering the potential to generate higher risk-adjusted returns. AOG Wealth Management, founded in 2000, is the advisor to the AOG Institutional Fund.

For more information about AOGFX or AOG Wealth Management, please visit aogfunds.com.

(1) The Fund has adopted a fundamental policy to make annual repurchase offers in the third calendar quarter of each year, at per-class NAV, of not less than 5% and no more than 25% of the Fund's outstanding Shares on the repurchase request deadline. In addition to this minimum repurchase offer, the Fund may, in the sole discretion of the Board, make additional written tender offers of its outstanding Shares pursuant to Rule 13e-4 of the Exchange Act at such times and in such amounts as the Board may determine, with such discretionary repurchases to typically occur on March 15, June 15, and December 15 of each year.

Important Information

An investor should consider the Fund's investment objectives, risks, and charges, and expenses carefully before investing or sending money. This and other important information can be found in the Fund's prospectus. To obtain a prospectus, please call 877-600-3573 or visit aogfunds.com. Please read the prospectus carefully before investing.

Investment in the AOG Institutional Fund ("AOGFX Fund") is speculative and involves substantial risks, including the risk of loss of a Shareholder's entire investment. Investors may not have immediate access to invested capital for an indefinite period of time and must have the financial ability, sophistication/experience, and willingness to bear the risks of an illiquid investment.

No public market for Shares exists, and none is expected to develop in the future. An investor's participation in the Fund is a long-term commitment, with no certainty of return. No guarantee or representation is made that a Fund will achieve its investment objective, and investment results may vary substantially from year to year. Additional risks of investing and important investor information should be reviewed at <https://aogfunds.com/additional-key-considerations/>.

Past performance does not guarantee future results. Diversification does not assure a profit nor protect against loss in a declining market.

Portfolio holdings and manager views are subject to change without notice, and discussions of portfolio holdings are intended as illustrations of investment strategy, not as recommendations to buy or sell any security. Information presented is for general purposes only and is not intended to provide specific advice or recommendations for any individual.

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