Leading the conversation.

IPA
Institute for Portfolio Alternatives

MEMBERSHIP
The Institute for Portfolio Alternatives (IPA) provides national leadership for the Portfolio Diversifying Investments (PDI) industry. We bring together the top asset managers, product distribution partners and industry service providers - new and established - who are dedicated to driving transparency and innovation in the marketplace. Through advocacy and industry-leading education, the IPA is committed to expanding access to real assets and creating more opportunities for retail investors to effectively balance their portfolios.

IPA Membership Offers:
- Exclusive networking opportunities at the PDI industry’s premiere events
- Participation in one of the IPA’s active committees
- Collaboration and development of industry best practice guidelines
- Premium branding opportunities
- Real-time actionable intelligence on critical legislative and regulatory issues
- Connection to important advocacy issues in Washington D.C. and the 50 states
- Proactive industry media relations
- Access to industry news platforms and educational webinars

PDI INDUSTRY REACH
The IPA supports increased access to investment strategies with low correlation to the equity markets: lifecycle real estate investment trusts ("Lifecycle REITs"), net asset value REITs (NAV REITs), business development companies (BDCs), interval funds, closed-end funds and direct participation programs.

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<th>Total assets held by REITs</th>
<th>Total assets held by BDCs</th>
<th>Total assets held by Interval Funds</th>
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<td>$95 BILLION</td>
<td>$20.5 BILLION</td>
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ADVANCING PORTFOLIO DIVERSIFICATION

Total assets held by REITs
Total assets held by BDCs
Total assets held by Interval Funds

$95 BILLION
$20.5 BILLION
$27 BILLION
SUPPORTING THE GROWTH OF PDIs

"The IPA is establishing industry standards, transparency, education and innovation – and that translates into industry growth."

– Nathan Headrick, Managing Director & Founder | Triloma
The Portfolio Diversifying Investments (PDI) industry is vast, and it’s growing. Product evolution is happening at a rapid pace and distribution channels continue to expand. But with limited time and resources, how do you put your business on a path for growth? IPA membership is the most effective way to get plugged in, stay informed and understand the latest trends in PDI products.
MEMBERSHIP CATEGORIES

**Distribution Partners:** The Distribution Partners membership category includes independent broker dealers, RIAs and wirehouse firms that offer alternative investment products to retail investors. *Annual IPA membership dues for Distribution Partners are complimentary*

**Asset Managers:** The Asset Managers membership category is composed of firms that sponsor and manage portfolio diversifying investment products, including REITs, BDCs, Interval Funds, Closed-End Funds and Direct Participation Programs. *Annual Dues: Based on firm’s cumulative equity raised*

**Industry Partners:** The Industry Partners membership category is comprised of companies that provide professional services within the portfolio diversifying investments industry, or which otherwise wish to market to such members or be associated with the industry. *Annual Dues: Based on firm’s industry-related revenue*

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LEADING THE CHANGE

"The IPA is at the vanguard of the PDI evolution and its members enjoy a competitive advantage."

— Scott Smith, President and CEO | FactRight, LLC
A POWERFUL INDUSTRY ADVOCATE

At the IPA your voice matters! Our members are on the leading edge of the policy and regulatory issues that directly affect the alternative investments industry. You’ll not only have inside access to real-time intelligence at the local, state and federal levels, but IPA members have a unique platform to actively engage in the legislative and rulemaking process. We work directly with legislators and regulators to ensure that new laws promote business growth and capital formation while protecting investors. The IPA is consistently recognized as the most effective advocate on behalf of the PDI industry, and your voice is important in growing our reach.

350+ MEETINGS ON CAPITOL HILL SINCE 2018

30+ COMMENT LETTERS SINCE 2018

TARGETED MEETINGS WITH: SEC, FINRA, NASAA, TREASURY DEPARTMENT/IRS

Your voice matters!

- Be an active voice on critical advocacy issues in Washington D.C. and across the 50 states
- Exclusive access to real-time, actionable intelligence on regulatory and legislative issues
- Opportunities for direct dialogue with the SEC, FINRA, NASAA, Treasury and key agencies
- Amplify your voice through IPA PAC, the only non-partisan political action committee exclusively dedicated to the unique issues of PDI products
UNITED WE STAND

"The IPA’s unifying voice for the industry is much stronger than any individual member firm."

— John Carter, Executive Chairman | Carter Multifamily
HELPING OUR MEMBERS GROW

The IPA is uniquely positioned to raise positive awareness of PDI products among stakeholders and market participants, including: investment advisers, public policymakers and the investing public. We offer a range of education platforms that support increased access to investment strategies with low correlation to the equity markets. Our Due Diligence Symposiums, IPA Chapter events, IPAVision, the IPASummit & Hill Day, WIN Forum and our exclusive webinar series all offer IPA members unique visibility to the topics and trends that are driving the industry conversation.
**IPASummit 2020** | April 27-30, 2020 | Washington, D.C.
IPASummit is the place for policy action! Meet with members of Congress on Capitol Hill, learn direct insights from the SEC, FINRA and NASAA and hear due diligence updates from leading asset managers from across the PDI industry.

**IPAVision 2019** | September 23-25, 2019 | Toronto, Ontario (Canada)
**IPAVision 2020** | September 21-23, 2020 | Chicago, IL
Join other industry leaders at IPAVision, where we’ll shape the discussion on critical issues and innovative solutions that continue to drive the expansion of the PDI industry.

**IPAltsEDGE** | June 17-18, 2019 | Chicago, IL
The IPAltsEDGE conference series offers an immersive workshop on PDI products, specifically designed to educate the RIA community. Featured topics include: portfolio construction with PDIs, compliance administration, due diligence considerations, marketing solutions and business growth strategies.

**WIN Forum** | June 19, 2019 | Chicago, IL
The IPA WIN Forum spotlights the influence of women professionals, recognizes their incredible achievements and promotes diversity in the financial services industry.

**IPAForum: QOZ Funds** | February 12-13, 2019 | Dallas, TX
Take a deep dive into Qualified Opportunity Zones in this two-day workshop. Gain an understanding of the origins of the zones, eligible investment types, investor tax advantages and the role each plays in due diligence.

**IPAChapters** | Regional meetings throughout the year
IPA Chapters is a national initiative designed to deliver timely education and networking opportunities exclusively to the PDI industry.

**IPA Webinar Series**
The IPA’s Direct Insights and AltsEdge Broker-Dealer Series monthly webinars feature industry leaders discussing regulatory and market developments as well as new and innovative client solutions.
STAY CONNECTED

Effective networking with your peers and clients is a top priority. But finding the time in a busy calendar is challenging! We understand your constraints and work tirelessly to make sure that every IPA event offers the right combination of learning and networking. Outside of our events, the IPA’s 14 specialized committees offer every member an opportunity to work with their industry peers on the issues that matter most to them. Committee participation provides great networking opportunities, professional development experiences and increases your visibility across the industry.

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SPECIALIZED COMMITTEES

ACCESS TO INDUSTRY NEWS PLATFORMS:
IPA SMARTBRIEF, ALTSOURCE AND THE GOLDEN APPLE

Join a committee:
- BDC and Closed-End Interval Funds
- Broker-Dealer Advocacy
- Communications
- Compliance
- Due Diligence
- Education
- Legal and Regulatory Affairs
- REITs
- RIA Advocacy
- Operations
- Policy and Government Affairs
- Private Placement
- Program
- Women’s Initiatives Network
VALUABLE COLLABORATION OPPORTUNITIES

"The future looks bright when hundreds of thoughtful leaders assemble in one place to learn and plan."

— Thayer Gallison, CFA, V.P., Due Diligence Officer | Ladenburg Thalmann Financial Services, Inc.
JOIN US.

Institute for Portfolio Alternatives

Apply at www.IPA.com/membership

Leading the conversation. | 202.548.7190 | www.ipa.com