

THE IPA'S STRATEGIC GROWTH PLAN

The IPA is a forward-thinking association that proactively helps shape and lead the emerging field of Portfolio Diversified Investments

The IPA engaged in a systematic and thorough process of examining the fundamental questions of why it exists, who it serves and what is needed to help its members maximize the potential of PDIs

Collaborative, transparent process that was led by the IPA's Board of Directors and included active participation by a diverse mix of IPA stakeholders

IPA's Current Mission and Strategic Purposes

MISSION

The Institute for Portfolio Alternatives (IPA) provides national leadership for the Portfolio Diversifying Investments (PDI) industry.

WHY WE EXIST

The IPA exists to help our members navigate a changing industry and achieve greater success.

We bring together the investment managers, broker-dealers, investment advisers and industry service professionals – new and established – who are dedicated to driving transparency and innovation in the marketplace.

Through advocacy and industry-leading data and education, the IPA is committed to ensuring all investors have access to real assets and the opportunity to effectively balance their investment portfolios.

The plan underscores the IPA's dedication to the IPA Community and the industry

The IPA is committed to:

- Growing the IPA strategically in a manner that strengthens and enhances our members' experience.
- Delivering value to our full spectrum of members.
- Being an inclusive, welcoming, nimble, transparent, proactive and purposeful organization.
- Articulating and advancing high industry standards of quality, ethics and performance.
- Recognizing the interconnections among our key stakeholders and encouraging mutually beneficial collaboration.
- Demonstrating the “mainstream” role that portfolio diversifying investments play in the financial sector.
- Helping our industry innovate and expand to serve diverse and emerging audiences.

Key Strategies

- a) **Establish an independent, robust and authoritative research platform** to advance industry data collection and analysis.
- b) **Develop and provide measurement and performance tools** and resources for IPA members and the overall industry.
- c) **Shape the industry and public narratives** by increasing media and public relations and educational activities and continuing to serve as a credible information source for legislators, regulators and the media.

Data & Research Task Force



- AI Insight
- Mountain Dell
- Envision Financial Systems
- DST Systems
- SS&C Technologies
- NASDAQ
- Robert A. Stanger
- Snyder/Kearney
- FactRight

Key Strategies

- a) **Build awareness, respect and support** for the PDI industry by continuing a proactive, integrated approach to advocacy that includes:
 - Research
 - Coalition Building
 - Communications
 - Direct and Grassroots Lobbying
- b) **Increase support and visibility** for IPA's PAC.
- c) **Optimize member involvement in advocacy** by strengthening local/regional programming and outreach.

Key Strategies

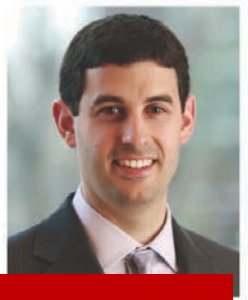
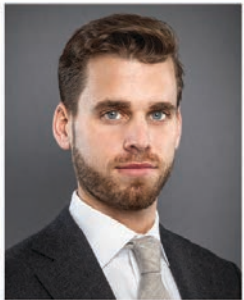
- a) **Strategically grow membership**, engaging all industry participants.
- b) **Expand the RIA market** through value-add programming and resources.
- c) **Clearly define and evolve member value and benefits** to ensure relevance for each type of member and the key functions within their companies.
- d) **Strengthen the member onboarding and retention process**
- e) **Improve the overall effectiveness of our content and offerings** (e.g., conferences, webinars, publications)

Key Strategies

- a) **Build a more streamlined, productive and effective committee structure.**
- b) **Recruit professionals from organizations** that are recent entrants to the PDI sector into IPA leadership roles.
- c) **Continue to facilitate board understanding**, collaboration and involvement in advocacy for the industry and on behalf IPA within their organizations, service providers and peers.
- d) **Create a “Next Generation Leaders”** initiative that offers leadership opportunities, programming and recognition.

TASK FORCE

Next Generation Leaders



Visit: [IPA.com/nextgen](https://www.ipa.com/nextgen)

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our future...**
How will you
be a part of
shaping it?



What role can and
should you play in
advancing our
community?