

DISTRIBUTION PARTNERS

The Distribution Partners membership category includes wirehouse firms, regional broker dealers, IBDs, financial institutions, RIAs and family offices, that offer portfolio diversifying investment (PDI) products to retail investors.

Annual IPA membership is complimentary.



IPA VALUE PROPOSITION

A POWERFUL INDUSTRY ADVOCATE

- Real-time actionable intelligence on critical legislative and regulatory issues
- Direct relationships and dialogue with the SEC, FINRA, NASAA, Treasury and key agencies

KNOWLEDGE & NETWORKING

- Showcase your firm and highlight your products and services
- Executives coming together to learn from industry experts and each other
- Expansion of business contacts through personal networking with industry leaders

INDUSTRY-LEADING PUBLIC RELATIONS

- Proactive PR efforts to increase awareness of PDIs
- Protect, enhance and build positive messaging for PDIs
- Exclusive relationship with a leading global communications firm

INDUSTRY VOICE

- Executive engagement in IPA committees provides national leadership for PDIs
- Your voice at the table affords opportunities to drive industry growth

www.ipa.com/membership



MEMBERSHIP BENEFITS

“With representation from a variety of product sponsors and broker/dealers, the IPA provides members a voice in the conversations that are shaping the alternative product landscape.”

– Matthew Fries, Head of Due Diligence
Cetera Financial Group

PRODUCT DUE DILIGENCE

IPA Due Diligence Symposiums focus on product offerings, investment strategies, providing comprehensive product analysis including investment strategy, manager’s track record as well as compliance and regulatory requirements. This forum offers the opportunity to meet portfolio managers and product specialists responsible for investment decisions.

DEFINING INVESTMENT STRATEGIES

Participate in member-driven initiatives that establish industry best practices, guidelines and product training, to benefit investors by understanding risks and increasing transparency.

STRATEGIC POLICY ADVOCACY

Gain inside access to real-time intelligence at the local, state and federal levels, and actively engage in the legislative and rule making process for the benefit of industry growth.

INDUSTRY CONNECTIONS

Connect with like-minded professionals on emerging trends, new product structures and investment strategies, for the benefit of industry growth.

IMPACTFUL ADVOCACY

The IPA has productive relationships with regulators at SEC, FINRA, NASAA and many state securities commissioners.

The IPA addresses regulatory and legislative issues specific to effectively creating, managing and distributing PDIs to individual investors.