

INDUSTRY PARTNERS

The Industry Partners membership category is comprised of companies that provide services to the portfolio diversifying investment (PDI) industry including attorneys, transfer agents and custodians, accounting and consulting, due diligence firms, valuation, and financial technology firms (FinTech).



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



MEMBERSHIP BENEFITS

“The IPA is doing incredible work to educate financial advisors and broaden the adoption of alternative investments across the private wealth community.”

— Dan Vene, Co-Founder & Managing Partner,
Head of Client Solutions, iCapital Network

IMPACTFUL OPPORTUNITIES

The IPA creates an education-based environment that directly connects your firm with the asset managers, broker-dealers, RIAs and wirehouses that can benefit utilizing your products and services.

THOUGHT LEADERSHIP

Participate in the IPA's strategic and directive strategies and initiatives. Engage with IPA members to manage and to distribute PDIs to individual investors.

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.

COMMITTEE ENGAGEMENT

Industry Partners have a unique opportunity to share and apply their counsel and expertise on a wide range of issues and initiatives to advance the PDI industry.

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.