



A voice of reason in unreasonable economic times ...

The Investment Managers and Advisors Alliance (IMAA) is a trade association promoting open communication between investment advisors and asset managers for the benefit of the investing public.

- Acts as the public face of the advisor channel.
- Allows members of the profession to better communicate with one another and, in turn, out to the investing public.
- Works for the betterment of the investment community as a whole.

Immediate Goal

Restore confidence in both the markets and investment professionals through major national media campaigns including television, print and radio ads.

Long-term Goals

- Enhance communication between parties in the advisor channel, which include investment advisors, asset managers, service providers and custodians.
- Create transparency in the advisor channel.
- Work together to enhance product offerings and help the investing public feel educated and confident in their chosen investment vehicles.
- Provide education directly to the public on the benefits of long-term investing and the importance of seeking professional investment advice.

Benefits

- Networking Opportunities
- Professional Support
- Online Community
- Mentoring Relationships

Members will include investment advisors and their providers who share in the belief that the investing public is best served by adhering to the principles set forth in the Investment Advisers Act of 1940.

**For more information about membership opportunities
contact Ken Gutwillig at 212-920-3480 or ken@theIMAA.org.**



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Program details:

Public Outreach

One core objective of IMAA is to improve communications with the investing public, so our members will directly benefit from our public service campaigns and outreach efforts. A portion of IMAA members' dues will support public service announcements (PSAs) in major media outlets geared toward educating investors on the fundamentals of sound investing and the benefits of seeking professional investment advice. Our direct outreach efforts will include – but not be limited to – classroom education, local and national community involvement and turn-key resources for our members to use for their own outreach efforts.

Progressive Think Tank™

IMAA's Progressive Think Tank™ is our ground-breaking series of moderated discussion groups that provide an opportunity for fund company representatives, financial advisors, media representatives, custodians and service providers to discuss issues affecting the profession. These groups will provide an interconnected platform to exchange an evolving web of ideas and best practices for the profession. Participants are encouraged to brainstorm, critique and create an open dialogue on topical issues. Meeting notes will be aggregated and posted to all members to keep the dialogue flowing within our online community.

Online Community

The IMAA web site provides a continuous way for members to discuss issues and serves as a forum for ongoing interaction outside of the IMAA Progressive Think Tank™. Members have direct access to RIAMarketplace.org™, the exclusive social networking community of IMAA. Additional online tools include access to webinars, white papers, survey tools, databases, support groups, appointment scheduling tools, compliance materials and best practice ideas.

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