



A voice of reason in unreasonable economic times ...

IMAA's Progressive Think Tank™

What is it?

A ground-breaking series of moderated discussion groups that provide an opportunity for investment advisors, fund company representatives, custodians, members of the financial press and service providers to come together and discuss issues affecting the profession.

The purpose of the Progressive Think Tank™ is to work together to enhance communication vertically between ourselves, our providers and our clients, in order to more efficiently and effectively present ourselves and our products to the public.

Where and when are the meetings held?

Progressive Think Tank™ groups will be formed in cities around the country. The IMAA will create a group in any region which can attract at least 10 member firms. One firm can serve as a dedicated host, or that responsibility can rotate, depending on the wishes of the member firms in that region. Each region will hold meetings quarterly.

Who are the attendees?

Each meeting will consist of 10-18 professionals representing a diverse sampling of firms in our profession. Each group will be comprised of members representing advisors, fund companies, custodians, the press, and service providers to the best extent possible.

What is the format for the meetings?

Meetings are scheduled for 90 minutes. We open each meeting with a 10-15 minute presentation by an expert on a timely topic affecting the profession: the economy, best practices or the markets, for example. A brief question and answer period follows, which acts as a jumping-off point for further discussions.

Do we follow Robert's Rules of Order?

No. This isn't Parliament. This is a free-form Think Tank experience. One person, one voice. These meetings are a totally democratic form of brainstorming, collaborating and creating a dialogue to improve how we function as a profession.

There are only two rules: (1) no selling during meetings, and (2) the moderator has the final word on whether to intercede if someone is selling (or showboating, or digressing too far from the topic at hand, etc.).

How are these meetings "Progressive"?

Each meeting group will be provided with notes distilled from all the meetings which have gone before. That way, no group has to "start from scratch", but will be able to see how issues and problems have already been addressed by other experts across the profession. At the end of each meeting, notes are forwarded back to IMAA headquarters to be aggregated in our database and made available to member firms, the press, and for future meetings.