



Unlocking Due Diligence Symposium Value IPAVision 2025 Distribution Partner Prep Call

Meet the *IPA Team*



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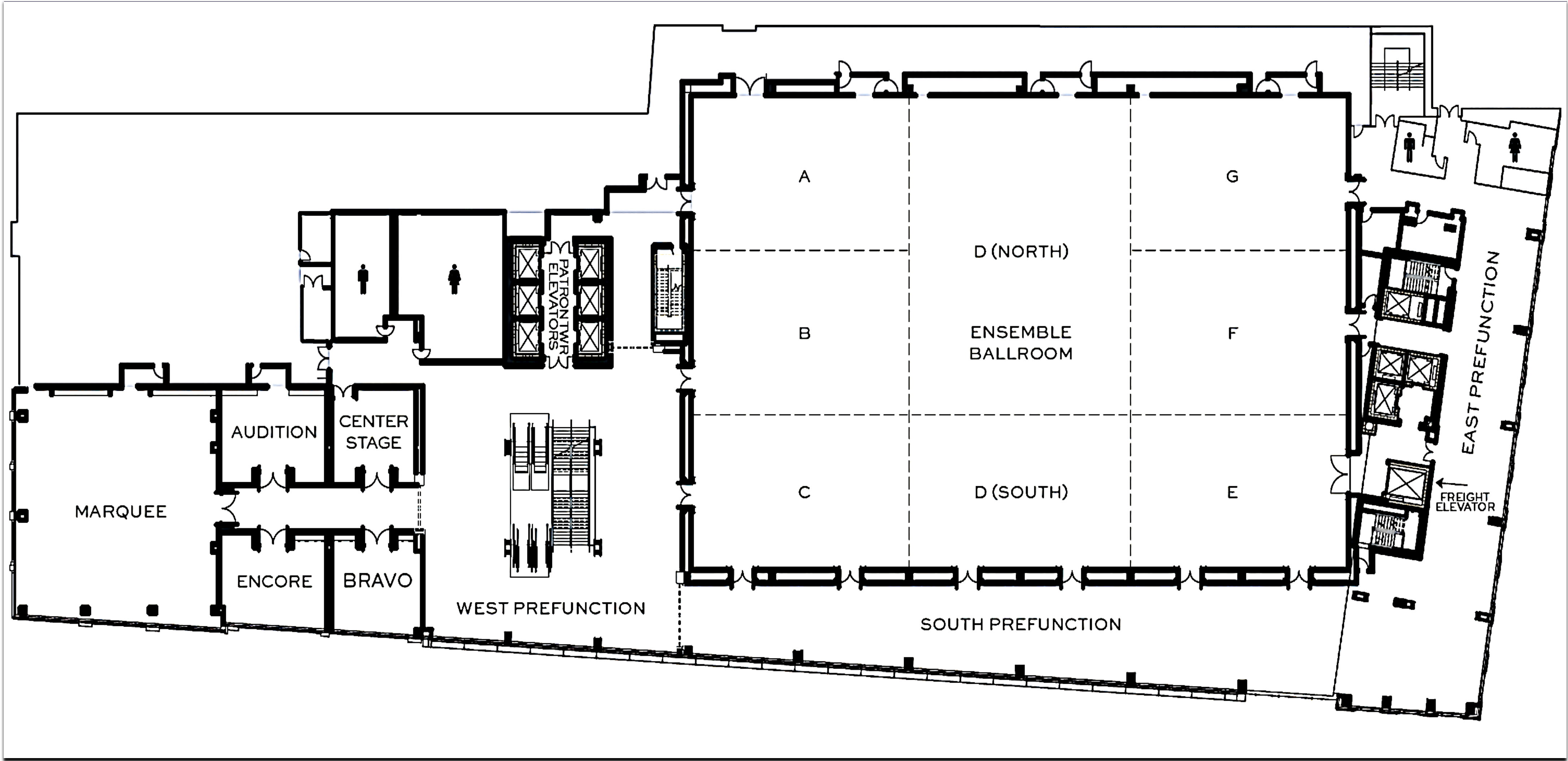
For cancellations or changes, please
contact Tracey Nilson at
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September 17-19
Boston, MA

Hotel Guide

Level 2 – Conference Level

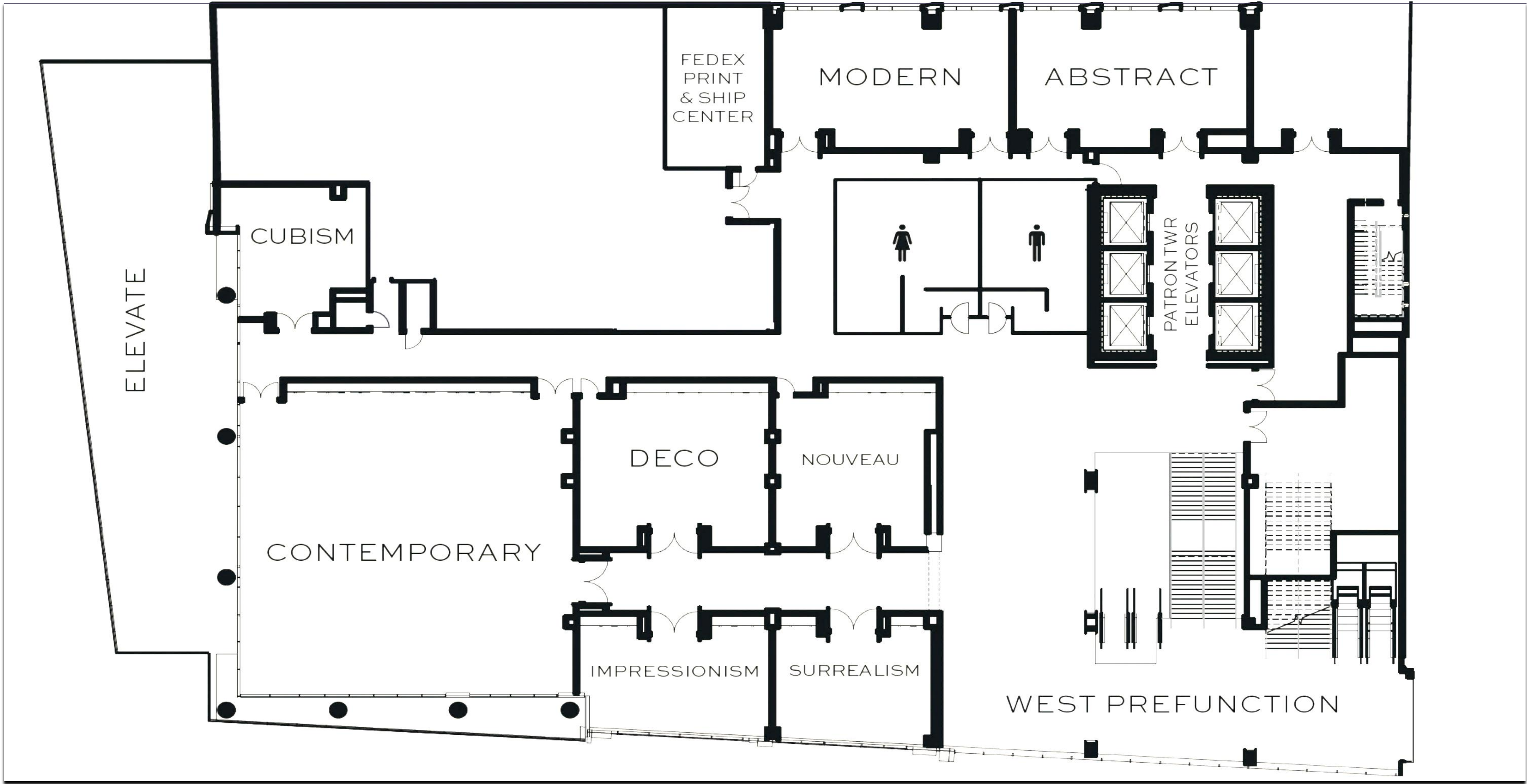
Due Diligence Symposium meetings on Lobby, Level 2 & Level 3



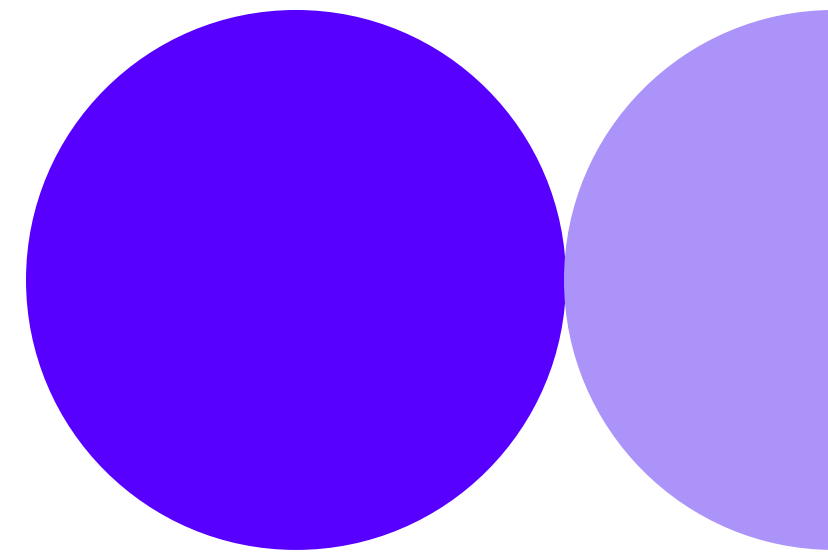
Hotel Guide

Level 3

Due Diligence Symposium meetings on Lobby, Level 2 & Level 3



Agenda Highlights



Wednesday, Sept. 17

- **7:30-8:30AM** – Networking Breakfast
- **12:30-2:00PM** – Innovators and Integrators Expo & Networking Reception
- **2:00-3:00PM** – Welcome to IPAVision 2025
- **6:00-7:00 PM** – The Opening Exchange

Thursday, Sept. 18

- **7:00-8:30AM** – Networking Breakfast
- **7:30-10:00 AM** – Due Diligence Symposium Meetings
- **10:00-10:15AM** – Networking Break
- **11:45AM-1:45PM** – Networking Lunch
- **1:45-2:00PM** – Networking Break
- **2:45-3:00PM** – Networking Break
- **6:15-7:15PM** – The Power Social

Friday, Sept. 19

- **7:30-8:30 AM** – Networking Breakfast
- **8:00-1:45 PM** – Due Diligence Symposium Meetings

Dine *Arounds*

Dine Arounds give you the chance to enjoy casual dinners that often lead to meaningful networking and new business opportunities.

- ✓ Sponsors will take the lead by choosing the restaurant, making the reservation, and hosting the dinner.
- ✓ You may be invited by different sponsors, giving you the opportunity to connect in a more personal setting.
- ✓ Dinners are intentionally kept small to encourage genuine conversations.
- ✓ These gatherings are optional but highly encouraged as a way to build stronger relationships outside of formal sessions.

Due Diligence Symposium Meetings

IPA
Vision
2025



The Due Diligence Symposium is one of IPA's most valued opportunities, giving Distribution Partners direct access to leading Asset Managers. In a private, small-group setting, you'll have focused time to review offerings, ask questions, and explore opportunities for your platform. The DDS is an efficient way to engage with multiple Asset Managers in one place while building meaningful connections.

Understanding IPA's Due Diligence Symposium

Structure & Logistics

- ✓ Event Format: The DDS is structured as a pitch-day style program, giving you dedicated time with Asset Managers in small-group meetings. These sessions take place during designated DDS blocks with no competing programming.
- ✓ Attending Asset Managers: 12 leading Asset Managers will participate this year, each hosting in a private boardroom-style meeting room.
- ✓ Room Rotations: You will be grouped with 7–8 Distribution Partner peers. Each group will rotate through every Asset Manager's room for a 30-minute session, with 10–15 minute breaks between rotations.
- ✓ Logistics & Communication: On Friday, Sept. 12, you'll receive a Know Before You Go email with all the details you need for a successful conference, including on-site information, travel reimbursement instructions, key contacts, and other reminders to ensure a seamless experience.

Distribution Partner Attendance

- ✓ Check-In: Each DDS room will have a QR code for electronic sign-in — please scan it when you enter.
- ✓ Attendance: Your full participation is essential. Distribution Partners registered for DDS are asked to attend all meetings.
- ✓ Conflicts: If you anticipate a scheduling conflict, let us know right away so we can assist and ensure you're connected with the Asset Managers on-site or via email.

Reimbursement Instructions

1. Complete the Reimbursement Form: To initiate the reimbursement process, complete our Reimbursement Request Form.
2. Receive an Email from BILL.com: After the conference, you will receive an email from BILL.com with instructions on how to set up your direct deposit information.
3. Provide Direct Deposit Information: Upon following the instructions from BILL.com, you will be able to securely provide your bank account details for direct deposit. If the reimbursement should be made to your firm, forward the email from BILL.com to your Accounting Team.

- Reimbursements will be processed after the conference.
- Contact Anh Romero, Director of Accounting at the IPA, at aromero@ipa.com, with questions.

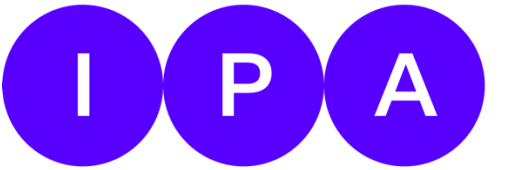
Visit Your Distribution Partner Resources Page



Stay prepared for a successful IPAVision 2025. The Distribution Partner Resources Page makes all the essentials available in a single location, including:

- ✓ Important deadlines and instructions
- ✓ Social media toolkit and graphics
- ✓ Conference updates
- ✓ General FAQs

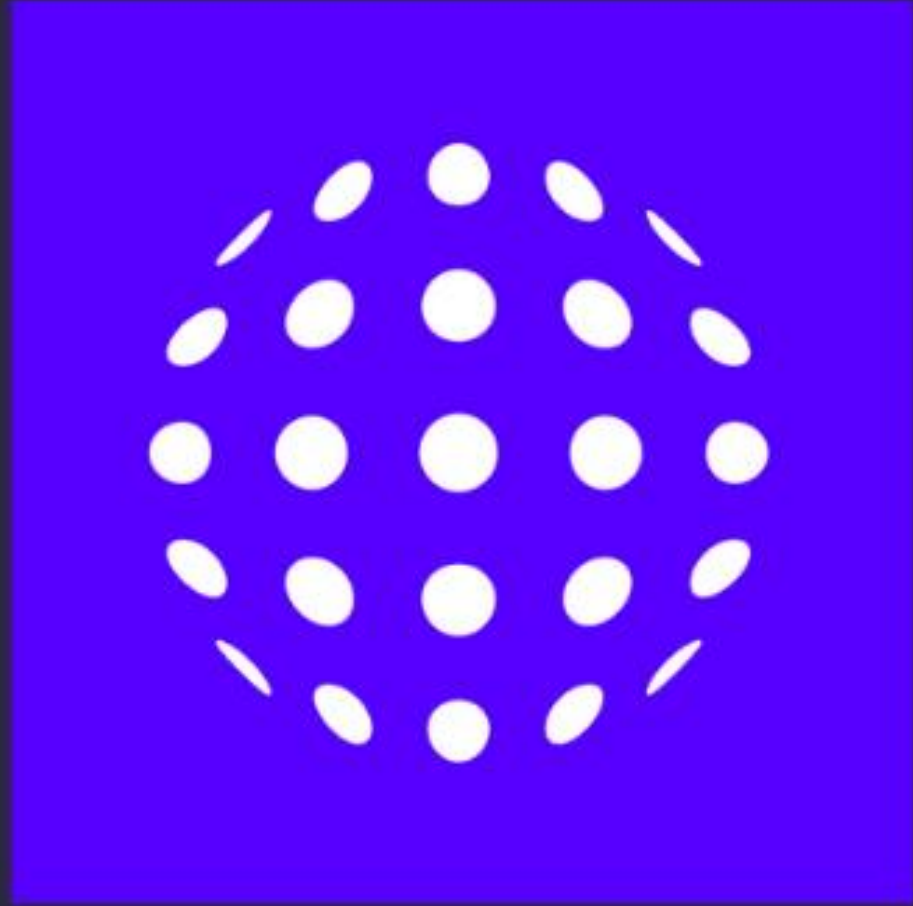
Social *Media Toolkit*



Promote Your Participation!

Spread the word about your involvement at IPAVision 2025 through social media, newsletters, and personal outreach. Use the IPAVision 2025 Social Media Toolkit — your go-to resource with event details, sample posts, step-by-step LinkedIn instructions, and downloadable graphics and logos.

1. Visit: www.ipa.com/events/vision/ipavision-sponsor-social-toolkit
2. Follow the step-by-step guide to share on LinkedIn.
3. Have questions? Contact marcomm@ipa.com



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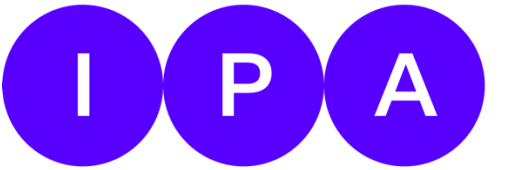
AltsGlobal London

November 10-12, 2025

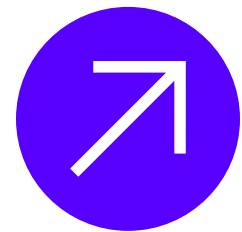
Registration Now Open
ipa.com/events/altsglobal/2025



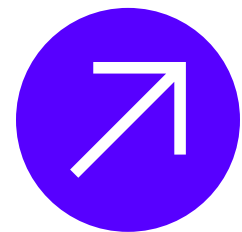
Thank you, *for your partnership!*



We're committed to making your IPAVision experience seamless and valuable, from logistics to connections, and our team is here to support you every step of the way.



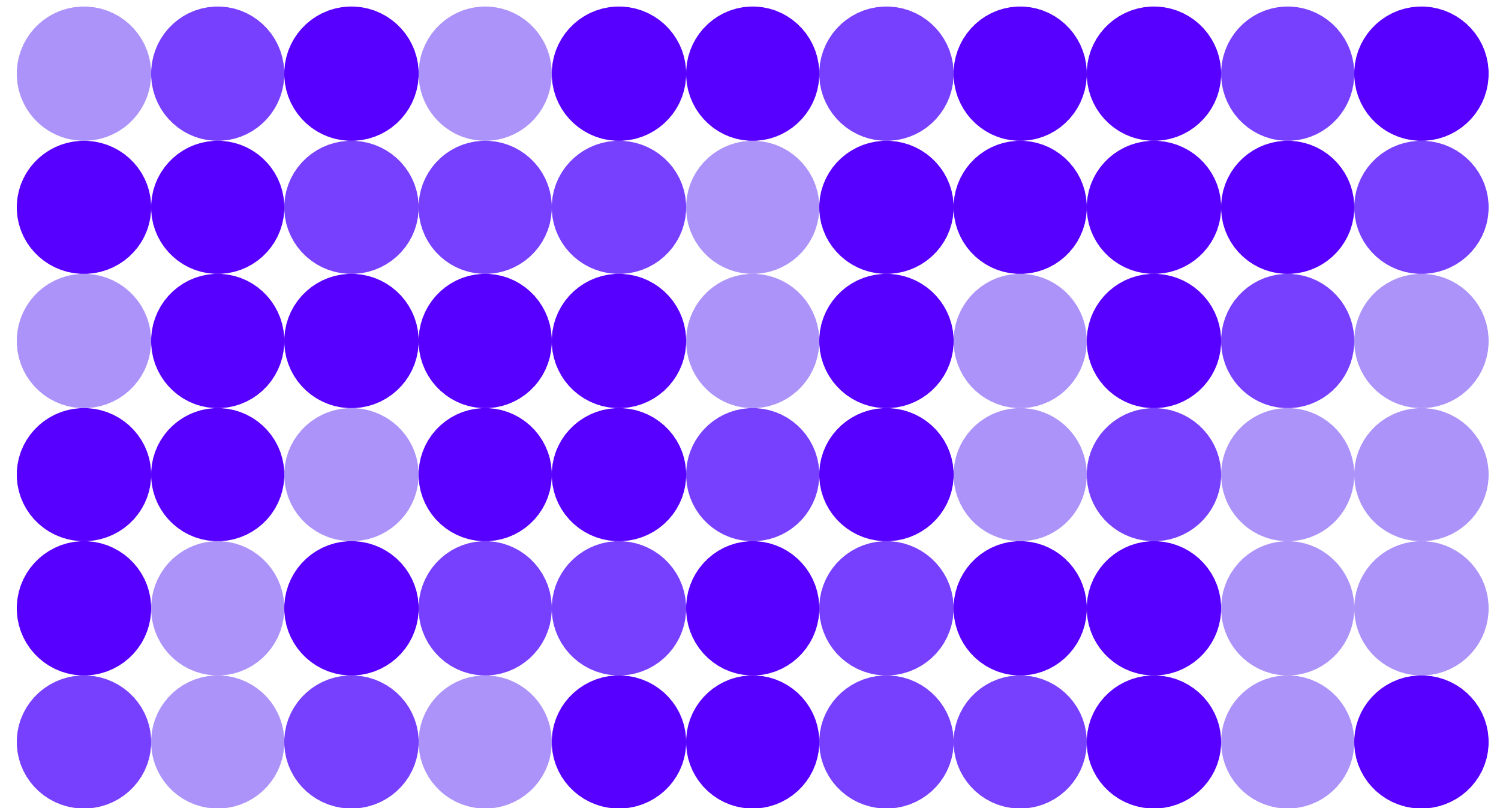
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*Together, we're shaping the future
of alternatives.*
See you in Boston!