

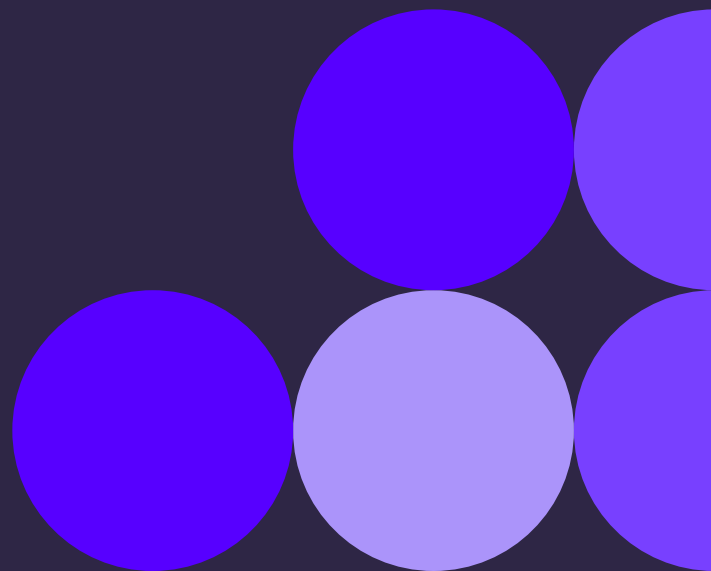
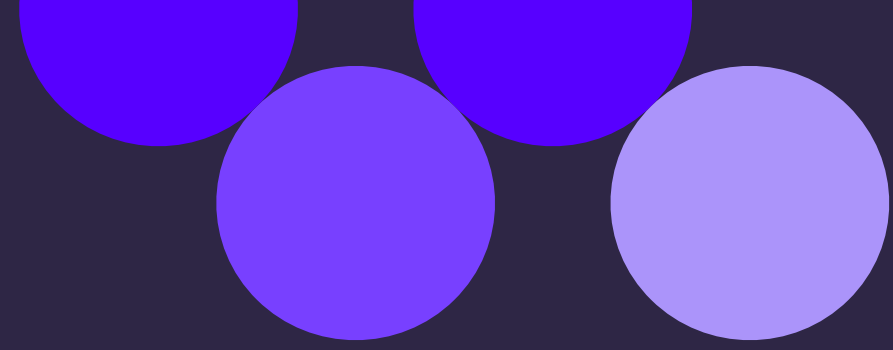


Institute  
for Portfolio  
Alternatives



# 2027 Event Sponsorships & Strategic Sponsorships

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# Welcome

## A note from our CEO

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Dear Members,

As the alternative investments industry continues to grow and evolve, I invite you to explore one of the most impactful ways to engage with our community, through strategic and event sponsorships with the Institute for Portfolio Alternatives (IPA).

The IPA is the leading voice for the alternative investments and private markets industry, bringing together asset managers, distribution partners, and service providers through our flagship conferences, policy roundtables, due diligence forums, and a growing international platform.

By partnering with us, you will gain year-round visibility and access to a powerful platform for thought leadership, brand exposure, and meaningful engagement. From high-impact speaking opportunities to signature experiences, IPA sponsorships are designed to elevate your presence among the decision-makers and innovators shaping the future of alternatives.

We look forward to working with you to create a lasting impact and support the continued growth of the alternative investments community.



**Anya Coverman**  
**President & CEO**



# Thank you to our 2026 partners



# *Elevate* your Reach

Becoming an IPA sponsor offers exceptional access to influential leaders and enables your brand to uniquely connect with our large and dynamic audience. Enhance your visibility and leave a lasting impression on key decision-makers and trendsetters.

[IPA.com](https://ipa.com) | [sponsorships@ipa.com](mailto:sponsorships@ipa.com)



# A Network of *Influence*

## IPA's Audience Advantage



### Leading Events

Our conferences and events gather leading professionals in alternative investments for innovative conversations and roundtables.

**1,800+**  
Attendees



### Significant Scale

Our asset manager members include many of the world's leading investment firms, managing trillions across global market.

**\$40T+**  
AUM



### Decision Makers

Our members are on the forefront of strategic decision-making and lead major firms within our dynamic investment sector.

**400+**  
CEOs and  
Executives

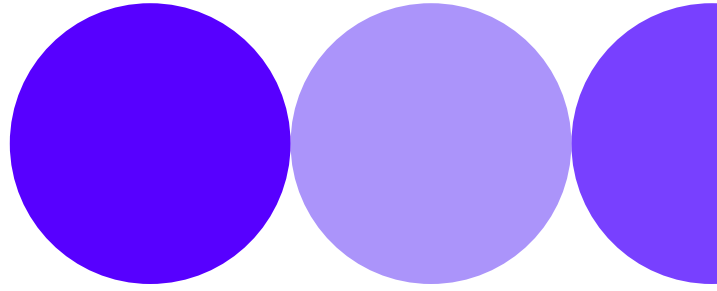


### Driving Connections

IPA's extensive distribution partner network can boost your ability to expand your presence and visibility in the industry.

**250+**  
Distribution  
Partners

# IPA 2027 *Events*



**I P A**  
**Wealth**  
**2027**

An interactive event where thought leaders and industry professionals explore the private wealth channel, emerging access points and opportunities in the growing private markets for RIAs, broker-dealers and family offices.

**February 10-12**  
Newport Beach, CA

**I P A**  
**Summit**  
**2027**

A leading Washington, D.C. event exploring critical business, operational and legal issues, including IPA's Capitol Hill Lobbying Day, where members meet policymakers and Congressional leaders to advance the alternative investments industry.

**May 19-21**  
Washington, D.C.

**I P A**  
**Vision**  
**2027**

The premier industry event of the year convenes over 600 influential leaders and stakeholders for a comprehensive exploration of macroeconomic and investment management trends, innovative solutions, product education and exclusive networking opportunities.

**September 15-17**  
Austin, TX

 **I P A**  
**AltsGlobal**  
**London**

The IPA's international conference brings together top alternative investment leaders to explore innovations, expand business across borders and examine global market trends and opportunities to scale offerings, enhance access and drive growth.

**November 8-10**  
London, U.K.

I P A

# Wealth

Newport Beach, CA



I P A

# Summit

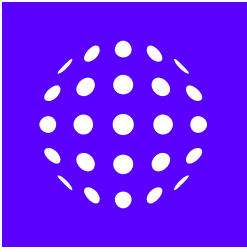
Washington, D.C.



# IPA Vision

Austin, TX



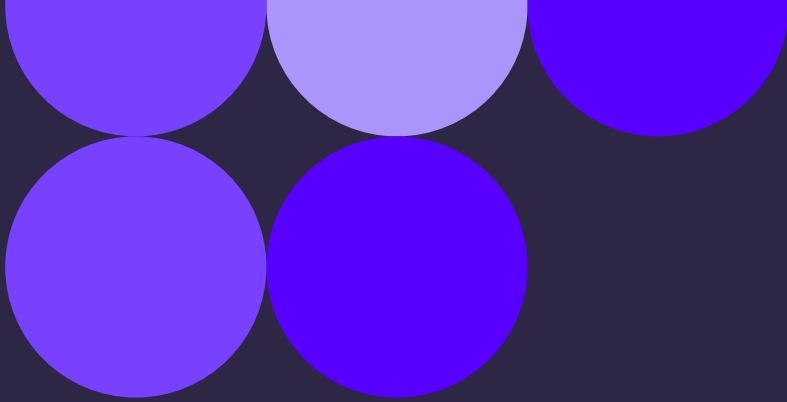


I P A

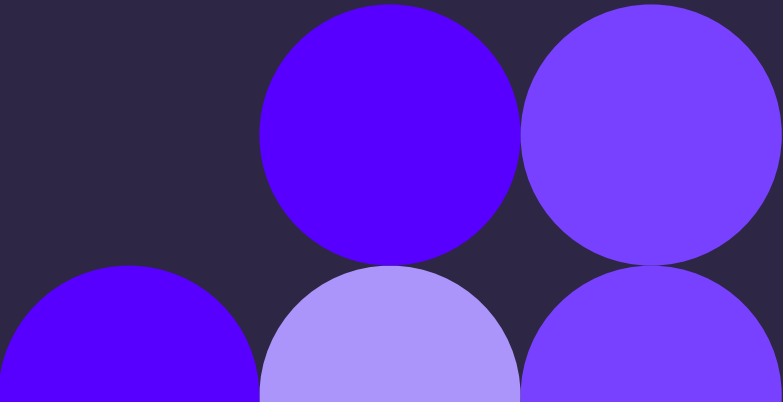
# AltsGlobal London

London, U.K.





# *Event Sponsorships*



# Event Sponsorships

## Sponsorship Highlights



Presenting Partner



Reception



On-Site Branding



Barista / Espresso Bar



# Event Sponsorships

## Sponsorship Highlights



Mobile App & Agenda



Exhibitor Display



Presenter



Sponsor Recognition



Tote, Notebook & Lanyard



Giveaways

# Event Sponsorships

## Sponsorship Highlights



Main Stage Banner



Exhibitor Display



Reception



WiFi






Keycard



# 2027 IPA Event Sponsorships

■ WEALTH    ■ SUMMIT  
■ VISION    ■ ALTSGLOBAL

 <b>IPA Wealth 2027</b> February 10-12 Newport Beach, CA EARLY BIRD: \$2,299 NON-MEMBER: \$5,799 REGULAR: \$2,499	 <b>IPA Summit 2027</b> May 19-21 Washington, D.C. EARLY BIRD: \$2,299 NON-MEMBER: \$5,799 REGULAR: \$2,499	 <b>IPA Vision 2027</b> September 15-17 Austin, TX EARLY BIRD: \$2,799 NON-MEMBER: \$6,499 REGULAR: \$2,999	 <b>IPA AltsGlobal London</b> November 8-10 London, U.K. EARLY BIRD: \$3,099 NON-MEMBER: \$3,299 REGULAR: \$3,299
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ESSENTIAL PARTNER	SIGNATURE PARTNER	OFFICIAL PARTNER	PRESENTING PARTNER	DUE DILIGENCE SPONSOR
\$15,000	\$22,000	\$33,000	\$40,000	\$50,000
\$15,000	\$22,000	\$33,000	\$40,000	\$50,000
\$20,000	\$30,000	\$40,000	\$45,000	\$55,000
\$15,000	\$22,000	\$33,000	\$40,000	NOT AVAILABLE
<b>STANDARD PACKAGE:</b> <ul style="list-style-type: none"> <li>2 Complimentary Registrations</li> <li>Attendee Contact List</li> <li>Email Branding</li> <li>Social Media Mentions</li> <li>Event Signage</li> <li>Exhibitor Display</li> </ul>	<b>STANDARD PACKAGE:</b> <ul style="list-style-type: none"> <li>2 Complimentary Registrations</li> <li>Attendee Contact List</li> <li>Email Branding</li> <li>Social Media Mentions</li> <li>Event Signage</li> <li>Exhibitor Display</li> </ul> <b>CHOOSE ONE:</b> <ul style="list-style-type: none"> <li>Main Stage Banner</li> <li>Media &amp; Photographer Package</li> <li>The Networking Lounge</li> <li>Connect &amp; Recharge Break</li> <li>Mobile App &amp; Agenda</li> <li>Conference WiFi</li> <li>Hotel Keycard</li> <li>Conference Lanyard</li> <li>Branded Tote Bag</li> <li>Main Ballroom Branded Notepads</li> <li>Elevator Graphics &amp; Wraps</li> </ul>	<b>STANDARD PACKAGE:</b> <ul style="list-style-type: none"> <li>2 Complimentary Registrations</li> <li>Attendee Contact List</li> <li>Email Branding</li> <li>Social Media Mentions</li> <li>Event Signage</li> <li>Exhibitor Display</li> </ul> <b>CHOOSE ONE:</b> <ul style="list-style-type: none"> <li>Moderator or Panelist Role</li> <li>Attendee Room Drop Gift*</li> <li>Opening Exchange Reception Host</li> <li>Power Social Closing Reception Host</li> <li>Barista &amp; Craft Espresso Bar</li> </ul>	<b>STANDARD PACKAGE:</b> <ul style="list-style-type: none"> <li>2 Complimentary Registrations</li> <li>Attendee Contact List</li> <li>Email Branding</li> <li>Social Media Mentions</li> <li>Event Signage</li> <li>Exhibitor Display</li> </ul> <ul style="list-style-type: none"> <li>BRANDING ON CONFERENCE STAGE AS EVENT PARTNER</li> <li>MODERATOR OR PANELIST ROLE</li> <li>FIVE-MINUTE MAIN STAGE MESSAGE BY YOUR FIRM</li> <li>SPECIAL ON-STAGE RECOGNITION AND BRANDING AT CONFERENCE WELCOME AND KICKOFF</li> </ul>	<b>ENHANCED PACKAGE:</b> <ul style="list-style-type: none"> <li>3 Complimentary Registrations</li> <li>Attendee Contact List</li> <li>Email Branding</li> <li>Social Media Mentions</li> <li>Event Signage</li> <li>Exhibitor Display</li> <li>DEDICATED PRIVATE DUE DILIGENCE SUITE</li> <li>SHOWCASE YOUR FIRM'S PRODUCTS TO LEADING DISTRIBUTION PARTNERS AT IPA'S DUE DILIGENCE SYMPOSIUM</li> </ul>

\* Customized with IPA.

2027 DISCOUNTS	
CHOOSE 3 EVENTS AT ANY SPONSOR LEVEL <b>15% OFF</b>	CHOOSE 2 EVENTS AT ANY SPONSOR LEVEL <b>10% OFF</b>



*Strategic Sponsorships*

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# 2027 IPA Strategic *Sponsorships*

Introducing IPA's 2027 Strategic Sponsorships—an opportunity to position your firm as a key IPA supporter. These sponsorships extend beyond conferences, offering year-round visibility and demonstrating your commitment alongside IPA as an industry leader. Through this strategic alignment, your firm and IPA can showcase a shared dedication to advancing alternatives.

[For details and pricing, please see the next page.](#)



## Global Partner

As IPA's flagship sponsorship, the **Global Partner** offers a fully customized engagement that positions your firm at the forefront of alternatives and private markets. Created in close collaboration with IPA, it aligns with your strategic priorities by combining visibility, thought leadership, advocacy and access to IPA's most influential platforms, driving results that strengthen your market position and expand your influence across the industry.



## Rising Leaders Champion

The year-long **Rising Leaders Champion** sponsorship emphasizes your firm's dedication to fostering the next generation of industry talent, with significant visibility at IPA events, hosting opportunities at the Rising Leaders/Board of Directors dinners, and exclusive engagements to showcase your commitment to supporting emerging leaders in the alternatives industry.



## AltsAcademy Series

Partner with IPA's **AltsAcademy Series** to drive thought leadership, research, and expertise across the alternatives industry. This year-long sponsorship positions your firm at the forefront of advancing industry knowledge through high-value content, co-branding, and multi-channel promotion, highlighting your commitment to shaping the future of the alternatives community.



## AltsInsights Video Series

Collaborate with IPA on the **AltsInsights Video Series**, featuring your firm in a high-quality, studio-produced 45-minute conversation on key industry topics. Benefit from co-branding, the opportunity for one of your leaders or experts to participate, and distribution across multiple platforms, highlighting your firm's commitment to innovation and thought leadership in alternatives.



# 2027 IPA Strategic Sponsorships

Introducing IPA's 2027 Strategic Sponsorships: Elevate your firm's visibility, demonstrate leadership, and align with IPA year-round to advance the future of alternative investments.

 <b>Global Partner</b>	 <b>Rising Leaders Champion</b>	 <b>AltsAcademy Series</b>	 <b>AltsInsights Video Series</b>
<p>IPA's flagship year-long sponsorship is designed to be fully customized to your firm's priorities. Created in collaboration with IPA, it can incorporate a range of high-value opportunities spanning visibility, thought leadership, advocacy, global outreach and engagement with IPA's most influential platforms.</p> <p><b>May include, for a 12-month period (customized to your firm):</b></p> <ul style="list-style-type: none"> <li>• Branding and recognition as IPA's premier partner across IPA communications and global platforms.</li> <li>• Options for speaking roles, moderator opportunities and other conference participation, including priority access to the Due Diligence Symposium.</li> <li>• Opportunities for thought leadership and co-branded content creation.</li> <li>• One-on-one strategic engagement with IPA leadership and government affairs on industry priorities.</li> <li>• Ongoing access on IPA's website as part of its online library of resources.</li> <li>• Priority participation in strategic initiatives, including access to IPA Distribution Partner and RIA Council exclusive events and dinners.</li> </ul>	<p>Year-long sponsorship of IPA's 2027 Rising Leaders Cohort featuring event hosting, branding, speaking opportunities, and engagement with cohort participants.</p> <p><b>Includes, for a 12-month period:</b></p> <ul style="list-style-type: none"> <li>• Main host of joint Rising Leaders / Board of Directors dinners, with seating for 2 participants from your firm at each dinner.</li> <li>• 5 minutes on stage at Vision to showcase your firm's commitment to the Rising Leaders program and highlight your firm to attendees.</li> <li>• Participation (with Exhibitor Display) at the Opening Day Networking Reception at Summit, Wealth, and Vision.</li> <li>• Branding as Rising Leaders Champion throughout the year, including at IPA events.</li> <li>• Includes the opportunity for a member of your firm to speak to the Rising Leaders, sharing expertise or insights about your firm.</li> <li>• Two complimentary registrations at each of Wealth, Summit and Vision.</li> </ul>	<p>Year-long sponsorship featuring thought leadership and partnership with IPA to advance knowledge, research and insight in the alternatives community.</p> <p><b>Includes, for a 12-month period:</b></p> <ul style="list-style-type: none"> <li>• Opportunity for your firm to create a knowledge product such as a white paper, research report or similar content, distributed to the IPA community.</li> <li>• Prominent co-branding, recognizing your firm as a thought leader delivering quality content to the alternatives community.</li> <li>• Promotion via IPA's LinkedIn, social media channels, web page and targeted member emails.</li> <li>• Inclusion in conference registration materials to maximize exposure to industry leaders and decision-makers.</li> <li>• Ongoing access on IPA's website as part of its library of resources.</li> </ul>	<p>Year-long sponsorship offering visibility, engagement, and alignment with IPA in the alternatives community.</p> <p><b>Includes, for a 12-month period:</b></p> <ul style="list-style-type: none"> <li>• Co-branding on one AltsInsights Video Series 45-minutes original episode.</li> <li>• Your firm's branding will be featured in the episode's introduction.</li> <li>• Option for your firm's leaders or experts to participate as featured guests in the series.</li> <li>• Your firm will receive a 30-second ad placement mid-episode.</li> <li>• Collaboration with IPA to identify discussion topics that align with your firm's priorities or expertise.</li> <li>• Distribution on YouTube, LinkedIn, Spotify, Apple Podcasts, IPA email channels and more.</li> <li>• Audience / reach of 20,000+.</li> </ul>
<p><b>\$150,000+</b></p>	<p><b>\$60,000</b></p>	<p><b>\$50,000</b></p>	<p><b>\$50,000</b></p>



Due Diligence  
*Symposium*

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Institute  
for Portfolio  
Alternatives

# IPA Due Diligence *Symposium*

IPA's Due Diligence Symposiums (DDS) are a key feature of IPA's annual conferences, designed to facilitate structured, small-group meetings between leading Asset Managers and senior Distribution Partner decision-makers.

Asset Managers benefit from dedicated time in a private, boardroom-style setting to present their strategies, offerings and firm insights, while Distribution Partners gain access to a select group of alternative investment sponsors for efficient, in-depth product evaluation.





# IPA Due Diligence *Symposium*

# Frequently Asked Questions (FAQs)

## ***What is the format of the Due Diligence Symposium?***

Each participating Asset Manager is assigned a private, dedicated conference room, arranged in a boardroom style and equipped with a coffee bar and refreshments station to create a comfortable and professional environment. Representatives from various Distribution Partner firms are organized into small groups of approximately 5 to 7 individuals and rotate through these rooms in 30-minute intervals throughout the conference.

DDS meetings are intentionally scheduled to avoid overlap with other conference programming, ensuring focused and uninterrupted time for due diligence discussions. This format allows Distribution Partners to explore a wide range of offerings, engage in meaningful dialogue, and evaluate each Asset Manager's strategies and capabilities in a confidential, small-group setting. Sessions are structured to promote interactive discussions rather than one-way presentations.

Distribution Partners are expected to attend all scheduled DDS sessions. Asset Managers, meanwhile, have continuous access to their assigned rooms throughout the conference and may use them during non-DDS times for one-on-one meetings or follow-up conversations. Asset Managers may customize their space to suit their preferred approach, whether for formal presentations, informal conversations, or the use of audiovisual materials and handouts. Breaks are built into the schedule to allow participants to regroup and prepare for their next meeting. Discussion topics may include firm overviews, current offerings, product updates and upcoming initiatives. IPA continuously builds relationships with new Distribution Partners to ensure a diverse and robust group at each DDS.

## ***Who are IPA's Distribution Partner members?***

IPA's Distribution Partners consist of key decision-makers from wire houses, independent broker-dealers, family offices, and registered investment advisors (RIAs). These senior professionals are responsible for product approval and conducting due diligence on new and existing alternative investments for their respective platforms.

## ***What are the expectations for Asset Managers?***

Prior to the symposium, IPA will host a virtual meeting with Asset Managers to review the attending Distribution Partners, the schedule, each Asset Manager's due diligence appointments, best practices and on-site logistical details, including Distribution Partner sign-in requirements. Asset Manager team members attending the conference are requested to participate in this virtual meeting to ensure everyone is fully prepared and aligned.

## ***What are the expectations for Distribution Partners?***

Distribution Partners must register for the DDS and are expected to attend all scheduled sessions. On-site, they are required to sign into each meeting to confirm participation. In cases where an unavoidable conflict arises, prior approval from IPA is requested. If a session is missed, IPA will coordinate a follow-up meeting with the relevant Asset Manager to ensure the engagement is still fulfilled.

To help ensure a productive experience, IPA hosts a virtual orientation with all participating Distribution Partners prior to the DDS. This session covers the list of attending Asset Managers, the meeting schedule, each Distribution Partner's individual appointments, and important on-site logistics.

## ***What are the benefits of participating in IPA's Due Diligence Symposium?***

Participating in IPA's DDS offers both Asset Managers and Distribution Partners the opportunity to connect with a broad and diverse network in a single setting. For Distribution Partners, it provides an efficient, comprehensive view of product offerings to support well-informed platform decisions. For Asset Managers, it streamlines outreach by consolidating conversations that might otherwise require numerous individual meetings throughout the year.

The feedback from participants underscores the value of IPA's DDS in driving networking opportunities among peers as well as productive, actionable discussions. IPA's DDS is seen as a unique platform within the alternative investment landscape, ensuring that Distribution Partners and Asset Managers alike can foster connections that advance the industry and support each organization's growth.

## **Sponsoring to Participate in DDS**

Participation in IPA's DDS is available to Asset Managers through sponsorship at any of IPA's annual conferences.\*  
The number of sponsorship opportunities is limited for each event to ensure high-quality engagement and interaction.



**I P A**  
**Wealth**  
**2027**

February 10-12, 2027  
Newport Beach, CA  
**\$50,000**



**I P A**  
**Summit**  
**2027**

May 19-21, 2027  
Washington, D.C.  
**\$50,000**



**I P A**  
**Vision**  
**2027**

September 15-17, 2027  
Austin, TX  
**\$55,000**

### **Additional Conference Benefits Included with DDS Sponsorship**

In addition to the opportunity to present directly to leading Distribution Partners, each DDS sponsorship includes the following benefits for the specific IPA conference for which the sponsorship is purchased:

- 3 Complimentary Registrations
- Attendee Contact List
- Email Branding
- Social Media Mentions
- Event Signage
- Exhibitor Display

\* Please note that the Due Diligence Symposium will not be offered at AltsGlobal London 2027.

# IPA

## Members



Institute  
for Portfolio  
Alternatives

The IPA has three membership categories:  
**Asset Managers, Distribution Partners,  
and Industry Partners.**

### Asset Managers

ACRE  
Adams Street Partners  
Antares Capital  
Apollo Global Management  
Ares Management Corporation  
Beacon Ridge Capital Management  
BentallGreenOak  
BGO  
BlackRock  
Blackstone  
Blue Owl  
Bluerock  
Bonaventure  
Booster Asset Management  
Bridge Investment Group  
Brookfield / Oaktree  
Cantor Fitzgerald  
Capital Square  
Carter Funds  
CIM Group  
CION Investments  
CNL Financial Group  
Cohen & Steers  
Colliers International  
Core Spaces  
Cottonwood Residential  
Crescent Capital  
Crow Holdings Capital Partners  
The Carlyle Group  
Deutsche Bank / DWS  
Eagle Point Credit Management  
EQT Group  
ExchangeRight  
Fidelity Investments  
Fortress Investment Group  
Forum Investment Group  
Four Springs Capital Markets  
Franklin Templeton  
FS Investments  
Future Standard  
Gladstone Companies  
Goldman, Sachs & Co.  
Golub Capital  
Griffin Capital Company  
Hines  
HPS  
I Squared  
InCommercial Property Group  
InfraRed Capital Partners  
Inland Real Estate Group  
Invesco  
Iron Point Partners  
Jefferies  
Jones Lang LaSalle  
J.P. Morgan  
John Hancock  
Kennedy Lewis  
KKR & Co.  
Lincoln Financial  
Lord, Abbett & Co  
Macquarie Group  
Madison Capital Group  
Monroe Capital  
Nomura Group  
Nuveen  
PGIM / Prudential

Principal Asset Management  
Prospect Capital  
Redbrick LMD  
Sagard  
Sealy & Company  
SLC Fixed Income  
SmartStop Asset Management  
Starwood Capital Group  
Stockbridge Capital Group  
Stonepeak  
StratCap  
Sun Life Capital Management  
T. Rowe Price

### Distribution Partners

1776 Wealth  
Abrigo  
Accretive Wealth Management  
Advanced Investments  
Advisors Asset Management  
Aegis Capital Corp.  
Aeon Capital  
AIAC Investment Group  
Alexander Capital LP  
Alexander Legacy Private Wealth Management  
Alliance Global Partners  
American Harbour Wealth Management  
American Trust Investment Services  
Ameriprise Financial  
Ameritas Investment  
Amicus Financial Advisors  
Andalus Capital  
Andalusian Wealth Management  
Apollon Wealth Management  
Archer Investors  
Arete Wealth Management  
Arkadios Capital  
Arvest Wealth Management  
Ascentis Wealth Management  
Aspen Capital Management  
Asset Strategy Advisors  
Athos Capital Advisors  
Atomi Financial Group  
Atria Wealth Solutions  
Aurora Private Wealth  
Aurora Securities  
Ausdal Financial Partners  
Axtella  
Baird  
Baker Tilly Capital  
Bank of America  
Benchmark Private Wealth  
Berilium  
Berthel Fisher  
Binah Capital Group  
BlueprintFinancial Strategies  
Bourbon Financial  
Cabin Securities  
Cabot Lodge Securities  
Calton & Associates  
Cambridge Investment Research  
Cape Securities  
Capital City Securities  
Capital Group  
Capital Investment Companies  
Capital Markets IQ  
Capitalia Advisors

Capitol Securities Management  
Caprock  
Carter, Terry & Company  
Cavria Advisors  
CEF Advisors  
Centaurus Financial  
Certy Partners  
Certified Financial Group  
Cetera Financial Group  
CFG Wealth Management  
Charles Schwab & Co.  
Chauner Securities  
Citi Wealth  
Citibank  
Citizens Bank  
Claraphi Advisory Network  
Clear Stream Advisors  
Coastal Equities  
Colorado Financial Service Corporation  
Commerce Street Investments  
CommonGood Capital  
Commonwealth Financial Network  
Concorde Investment Services  
Corient Capital Partners  
Corporate Investments Group  
Crawford 1031 Advisors  
Crescent Securities Group  
Crosspoint Financial  
D.H. Hill Securities  
DAI Securities  
Davies Wealth Management  
Dempsey Lord Smith  
DFPG Investments  
DJ Investment Group  
Doceo Wealth  
Dwyer Financial  
Dynasty Financial Partners  
Edward Jones  
Elevate.Money  
Emerson Equity  
Endeavor Advisors  
EntryPoint Wealth Management  
EP Wealth Advisors  
Equitable Holdings  
Equity Services  
Essex National Securities  
F.L.Putnam Investment Management  
Fidelity Investments  
Financial Connection  
Financial Service Group  
First Financial Equity  
First Foundation  
FlowStone Partners  
FNEX  
FourStar Wealth Advisors  
GCB Private Wealth  
Geneos Wealth Management  
General Partner  
Global Investment Company  
GRAnderson Wealth Management Group  
Great Point Capital Advisors  
Grove Point Financial  
Hantz Financial Services  
Harbor Investment Advisors  
Hartfield Financial & Insurance Services  
Haworth Advisory Services  
Heritage Fincorp  
High Speed Alliance

# IPA

## Members



Institute  
for Portfolio  
Alternatives

The IPA has three membership categories:  
**Asset Managers, Distribution Partners,  
and Industry Partners.**

Hightower Advisors  
Hilltop Securities  
Honor Townsend & Kent  
IBN Financial Services  
IDB Capital  
Independent Financial Group  
Independent Financial Partner Securities  
Infinity Financial Services  
Integras Partners  
Integrity Financial  
International Assets Advisory  
Investment Planners  
Invicta Advisors  
IPI Wealth Management  
J.W. Cole Financial  
JRW Investments  
Kestra Financial  
Kingswood U.S.  
Kovack Securities  
Landolt Securities  
LaSalle St. Securities  
Lazari Capital  
Legacy Wealth Management  
Lido Advisors  
Lifemark Securities  
Lincoln Financial Network  
LPL Financial  
M Holdings Securities  
Madison Avenue Securities  
Madison Capital Group Holdings  
Madrona Financial  
Magnolia Private Wealth  
Mainsail Asset Management  
Manhattan West  
Massey Financial Group  
MassMutual Wealth Management  
Merchants Capital Trust  
Metric Financial  
Mill Creek Capital Advisors  
Mindful Wealth  
Mitchell Financial Management  
Money Concepts  
Morgan Stanley  
MSF Capital Advisors  
New York Life  
Newbridge Securities  
NexTrend Securities  
NI Advisors  
Nobles & Richards  
North Capital  
Northland Securities  
Northwestern Mutual Wealth Management  
Optivest  
Osaic  
Packerland Brokerage Service  
Parcion  
Pariter Securities  
Park Avenue Securities  
Paul M. Wendee & Associates  
Paulson Investment  
PI Wealth Plan  
Pinnacle Capital Securities  
Private Advisor Group  
Prospera Financial Services  
Protected Investors of America  
Provident Wealth Advisors  
Prudential  
Purshe Kaplan Sterling Investments

Qubera Wealth Management  
Quiver Financial  
Raymond James  
RCM Investments  
Real Estate Transition Solutions  
Realized Financial  
Realta Wealth  
Regal Securities  
Renovate Financial Planning  
RisCura Solutions  
Robertson Stephens  
Rockefeller Global Family Office  
Rudwall Wealth Management  
RWA Wealth Partners  
Sanctuary Wealth  
SCP Steward Capital Advisors  
Seasons Investments  
Sequence Financial Specialists  
Sigma Financial Corporation  
Simons Financial Network  
South Coast Investment Advisors  
SpirePoint Private Client  
Steward Partners Global Advisory  
Strategic Blueprint  
Synergy Private  
The O.N. Equity Sales Company  
The Strategic Financial Alliance  
The WealthPlan  
The Merchants Financial Group  
Titan Securities  
Tobin & Company  
Tradesk Securities  
Triad Advisors  
TritonPoint Wealth  
Trustmont Financial Group  
TWIG Asset Management  
U.S. Bancorp Investments  
UBS Financial Services  
UBS Unified Global Alternatives  
United Planners Financial Services of America  
Upmarket Co  
USA Financial Securities  
Vanderbilt Financial Group  
Vestech Securities  
Voya Financial  
Wangard Family Office  
Wealthforge Securities  
Wealthspire  
Wedbush Morgan Securities  
Wells Fargo  
Whitehall-Parker Securities  
WhiteStar Advisor  
Willis Johnson & Associates

Cohen & Co  
Computershare  
Corastone  
Davis Polk & Wardwell  
Debevoise & Plimpton  
Deloitte  
DLA Piper  
DTCC  
Envision Financial System  
Eversheds Sutherland  
Exeter Trust Company  
FactRight  
Gibson Dunn  
Groom Law Group  
iCapital  
Investcloud  
Kroll  
Kunzman & Bollinger  
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