

Strategic Plan One Page Overview

Foundation

Vision

The Alternative Investment Association's (AIA) vision is to become the leading authority in the alternative investment industry, recognized for our commitment to enhancing professionalism, industry growth, and investor education. We aim to create a future where alternative investments are accessible and understood by all, driving the creation of generational wealth and contributing to a more diverse and robust investment landscape.

Mission

AlA's mission is to advance the professionalism, growth, and understanding of the alternative investment industry. AlA provides a robust platform for networking, resource-sharing, leadership in legislative issues, and a strong focus on education. We strive to protect the interests of the alternative investment industry and the investing public it serves, creating generational wealth opportunities for current and future investors.

Strategic Issues

- 1. How to accelerate a Growth Strategy for the Association...
- 2. Capitalizing on Alternative Investment security during economic downturn/recession/foreclosure crises...
- 3. How to adjust to the emerging opportunities and threats presented by aging generations (i.e. Boomers, Gen X, Millennials, and Gen Z) and their widely varying investment views and behaviors...
- 4. How to adapt to Artificial Intelligence and its increasing role in investing, trading, market analysis, marketing, advertising, customer relations, business operations, etc...

Social Media

https://www.instagram.com/altinvestassoc/

https://www.linkedin.com/company/alternative-investment-association

https://www.facebook.com/AltInvestAssoc

https://twitter.com/AltInvestAssoc

Strategic Framework

WAYS	ENDS and MEANS
WATS	A. Establish a Strong Membership Base
	Launch a targeted marketing campaign to attract potential members.
	Develop an attractive membership package with unique benefits and resources.
	Implement a referral program to encourage current members to recruit others.
1. Promote Best Practices, Standards, and Excellence	Organize members-only events to foster a sense of community and exclusivity.
	B. Maintain High Standards of Ethics and Integrity Create a comprehensive code of conduct and ensure all members agree to adhere to it. Offer training or resources on ethical investment practices. Establish a transparent procedure for handling violations of the code of conduct. C. Establish Association Certifications for Businesses and Individuals Conduct a comprehensive needs assessment to identify certification requirements. Define a clear and robust certification framework. Develop tailored certification programs for businesses and individuals. Engage subject matter experts in the development and review process. Implement a rigorous examination process to assess candidates' knowledge and proficiency. Provide opportunities for continuing education and professional development. Promote the benefits of Association Certifications for credibility and marketability.
	 Monitor and maintain certification standards to meet industry needs. Regularly review and update certifications to incorporate new developments.
	Establish mechanisms for certification renewal and ongoing professional growth.
	A. Develop High-Quality Resources and Programs
	 Host networking events (both online and in-person) to foster collaboration among members. Develop mentorship or coaching programs to support members' professional growth.
2. Networking and	Release regular industry reports or newsletters to keep members updated with the latest trends and news.
Resourcing	B. Forge Partnerships with Industry Leaders
	Engage in mutual promotional agreements or joint events with other industry organizations.
	Create an affiliate or partner program to formalize and incentivize collaborations.
	Participate in industry conferences or forums to network and build relationships.
3. Provide	Advocate for Favorable Policies
	Establish a dedicated advocacy or policy team to monitor and influence legislative issues.
Leadership for	Create and promote white papers or policy recommendations related to alternative investments.
Legislative Issues	Foster relationships with policymakers and regulators to advocate for the industry's interests.
4. Educating	Promote Understanding of Alternative Investments
	Develop and distribute user-friendly guides or primers on various types of alternative investments.
	Conduct public seminars or workshops to educate the general public.
	Collaborate with financial educators or influencers to broaden reach.
	A. <u>Ensure Organizational Sustainability</u>
	Diversify our income streams, such as membership fees, donations, grants, event tickets, sponsorships, etc.
	Develop a financial contingency plan to safeguard against economic downturns.
5. Improve and	Seek grants or sponsorships that align with our mission and values.
Evolve the Association	B. Measure Impact and Success
, 100001411011	Implement a comprehensive analytics system to track key performance indicators (KPIs).
	Conduct regular strategy review meetings to discuss progress and make necessary adjustments.
	Seek regular feedback from members and stakeholders to gauge satisfaction and identify areas for improvement.

KPIs

Strong Membership Base Number of new The to	Develop High- Quality Resources and Programs The usage rate of resources	Forge Partnerships with Industry Leaders Number of new partnerships or collaborations	Advocate for Favorable Policies		Promote Understanding of Alternative Investments		Maintain High Standards of Ethics and Integrity		Ensure Organizational Sustainability	Measure Impact and Success		Establish Association Certifications for Businesses and Individuals	
			Number of policy changes influenced	Stakeholder feedback on	Number of educational initiatives	Participant feedback on educational	Number of ethical complaints or violations (e.g.	Member participation	Revenue growth Cash flow	Development of KPIs for each goal	Member satisfaction survey results	Certification Enrollment Rate	Certification Impact
Member retention	Attendance rates	oonaboranono	acricca	advocacy	launched	programs	members versus	into improving		gou.	ou. rey recurs	Certification	Industry
rate	at programs and events	Impact of partnerships	Number of advocacy	effectiveness Improvement in	Number of	Changes in	non-members)	ethical standards	Operating costs	Regular review of KPI metrics	Achievement of set targets (e.g.,	Completion Rate	Recognition
Membership growth rate	Participant	(shared events, co- developed	initiatives participated in	industry conditions due to	participants in educational	understanding or behavior (via pre-	Members' understanding of		Number of volunteers		revenue, member growth, policy	Certification	Continuing Education
Member	satisfaction survey results	resources)	(e.g. CRS gueries)	advocacy	initiatives	and post-program surveys, post	ethical standards (measured via		Diversity of income sources		influence)	Satisfaction Rate	Participation
satisfaction survey	B 11 1	Stakeholder	,,,,			course quizzes)	surveys or		N. D O			0 1:5 1:	Certification
results	Participant feedback on	feedback on partnership					quizzes)		Net Promoter Score			Certification Renewal Rate	Program Updates
	program improvements	effectiveness											Candidate Pass Rate

Resources AIA Will Offer

Growing through Knowledge, Succeeding through Networks

- Industry-Specific Research and Insights: AIA regularly publishes research and insights on the latest trends and developments in the alternative investment industry. This information can help members stay abreast of the changing landscape and make informed investment decisions.
- 2. Access to Experts and Industry Leaders: Members of AIA have access to a network of industry experts and thought leaders. These professionals can offer advice, share experiences, and provide insights into the complexities of alternative investments.
- 3. Ethics and Compliance Resources: AIA provides guidelines, tools, and resources to help members adhere to best practices and maintain the highest standards of ethical conduct. This includes information on compliance with regulations and industry standards.
- 4. Collaborative Platforms: AIA offers platforms where members can share their resources, knowledge, and expertise. This promotes a collaborative environment that drives collective success and industry advancement.
- 5. Investment Tools and Resources: AIA provides various tools and resources to assist members in their investment decisions. This includes databases of alternative investment options, risk assessment tools, and portfolio management resources.

Alternative Investment Industry SWOT

See Written Plan for Detail

Strengths:

- Diversification
- High Return Potential
- Inflation Hedging
- Access to Unique Opportunities
- Innovation and Flexibility
- Long-Term Oriented
- Exposure to Global Markets

Weakness:

- Illiquidity
- High Fees
- Complexity and Risk
- Lack of Transparency
- Regulatory and Legal Risks
- Valuation Challenges
- Dependence on Management Skills

Opportunities:

- Emerging Markets
- Technological Advancements
- ESG and Impact Investing
- Real Estate and Infrastructure Development
- Private Debt
- Health and Biotech Sector
- Cryptocurrencies and Blockchain
- Special Purpose Acquisition Companies (SPACs)

Threats:

- Regulation
- Tax Policy
- Public Perception
- Market Volatility
- Interest Rates
- Competition