

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

AIA's mission is to advance the professionalism, growth, and understanding of the alternative investment industry. AIA 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 |
|---|---|
| 1. Promote Best Practices, Standards, and Excellence | A. Establish a Strong Membership Base <ul style="list-style-type: none"> 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. Organize members-only events to foster a sense of community and exclusivity. |
| | B. Maintain High Standards of Ethics and Integrity <ul style="list-style-type: none"> 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 <ul style="list-style-type: none"> 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. |
| | 2. Networking and Resourcing |
| | 3. Provide Leadership for Legislative Issues |
| 4. Educating | |
| 5. Improve and Evolve the Association | |

Resources AIA Will Offer

Growing through Knowledge, Succeeding through Networks

- 1. 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

KPIs

| Establish a Strong Membership Base | Develop High-Quality Resources and Programs | Forge Partnerships with Industry Leaders | 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 new members | The usage rate of resources | Number of new partnerships or collaborations | Number of policy changes influenced | Stakeholder feedback on educational initiatives launched | Participant feedback on educational programs | Number of ethical complaints or violations (e.g. members versus non-members) | Member participation into improving ethical standards | Revenue growth |
| Member retention rate | Attendance rates at programs and events | Impact of partnerships (shared events, co-developed resources) | Number of advocacy initiatives participated in (e.g. CRS queries) | Stakeholder feedback on advocacy effectiveness | Changes in understanding or behavior (via pre- and post-program surveys, post course quizzes) | Member participation into improving ethical standards | Member satisfaction survey results | Cash flow |
| Membership growth rate | Participant satisfaction survey results | Stakeholder feedback on partnership effectiveness | Improvement in industry conditions due to advocacy | Number of participants in educational initiatives | Members' understanding of ethical standards (measured via surveys or quizzes) | Member participation into improving ethical standards | Achievement of set targets (e.g., revenue, member growth, policy influence) | Operating costs |
| Member satisfaction survey results | Participant feedback on program improvements | | | | | | | Number of volunteers |
| | | | | | | | | Diversity of income sources |
| | | | | | | | | Net Promoter Score |
| | | | | | | | | Development of KPIs for each goal |
| | | | | | | | | Regular review of KPI metrics |
| | | | | | | | | Certification Enrollment Rate |
| | | | | | | | | Certification Completion Rate |
| | | | | | | | | Certification Satisfaction Rate |
| | | | | | | | | Certification Renewal Rate |
| | | | | | | | | Industry Recognition |
| | | | | | | | | Continuing Education Participation |
| | | | | | | | | Candidate Pass Rate |