



Through formal and informal mechanisms, the MMI has become a sounding board where management firms, distributors and others in the business hammer out stances, standards and boundaries for a business that has developed a substantial footprint in the financial services industry.

—Investment News

### MMI's Primary Objectives

- Advancing the future of investment advisory solutions
- Providing a comprehensive database to serve as the definitive source of information on the investment advisory solutions industry
- Facilitating a forum for senior executives to address industry issues
- Serving as an expert resource to public policy makers and regulators (SEC, FINRA, CFA Institute, etc.)
- Facilitating operational solutions to promote industry growth
- Educating reporters on the benefits of advisory solutions
- Creating an efficient and automated operational data standards solution

### MMI helps its members CONNECT, KNOW, GROW

Our members **Connect** through our professional networking and events, they **Know** through our data reporting and educational initiatives, and **Grow** from our regulatory affairs and industry advocacy.

Since 1997, MMI has been the leading voice for the global financial services organizations that provide advice and professionally-managed investment solutions to individual and institutional investors. Through industry advocacy, educational initiatives, regulatory affairs, data reporting and professional networking, MMI supports and advances the growth of advisory solutions. MMI members' advice-driven investment solutions serve an evolving worldwide financial landscape and their organizations are committed to the highest standards of fiduciary responsibility and ethical conduct.

### Opportunities to CONNECT—increase industry exposure, meet industry colleagues and share ideas

- Annual meetings highlighting sales, technology, marketing, legal and regulatory issues
- Committee Memberships, including:
  - Emerging Managers
  - Legal & Regulatory Affairs
  - Technology and Operations
  - Retirement Solutions
  - Investment Manager Research
  - Alternative Investments
- A forum affording member firms leadership opportunities to shape the future of the managed solutions industry

### Opportunities to KNOW

- Proprietary, industry data available to members only
  - Ongoing study of quarterly AUM, sales flows, product information and trends
  - Identification and discussion of industry trends, regulations and operational procedures
  - Exclusive surveys of member sales strategies, marketing practices, administrative and operational issues
  - Member only section of MMI website
  - Member only 'NetMeetings
  - Educational workshops

### Ability to GROW

- Continuing education and liaison to media representatives
- Advocacy with regulators and public policy makers
- Efficiency from industry standards and operational improvements
- Industry workplace diversity program, Gateway to Leadership



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