

ALTERNATIVES IN PENSION
AND ON PLATFORMS

ALTERNATIVE INVESTMENT SUMMIT

DELEGATE FEEDBACK

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Introduction

Intelligent Partnership, the UK's leading authority on the alternative investments sector, hosted the inaugural Alternative Investment Summit (AI Summit) at London's Barbican on November 27. The summit was accredited by the IFP and counted as 7 hours of structured CPD.

The AI Summit came about because we truly believe that alternative investments are a valuable part of investment portfolios for many clients - but in the proper advised context.

We were very pleased with the attendance on the day, the event was a sell out with over 215 attendees representing providers, professionals and planners from across the industry. We took the opportunity to send out a short survey to gather some feedback on the day, and to see whether everyone enjoyed the event as much as we did (and to make sure that next years' event is even better)!

An overwhelming majority (87% of respondents) rated the summit as either 'excellent' or 'very good' with no-one rating the day as 'unsatisfactory'. A small number rated the day as "good" or "average", but overall we are extremely happy with this outcome.

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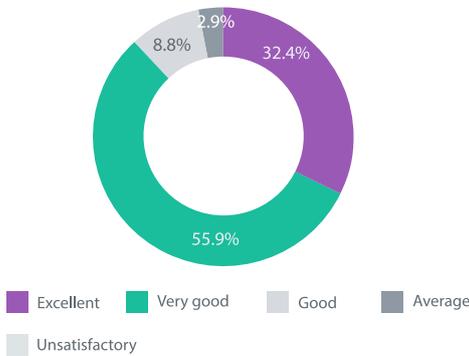
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ALTERNATIVE INVESTMENT SUMMIT DELEGATE FEEDBACK

Overall, how would you rate the AI Summit?



Source: Intelligent Partnership

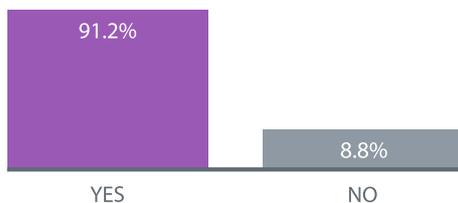
When asked to describe the summit experience in a few words, we received some excellent responses.

- "Good speakers, informative, relevant."
- "Thought provoking. Intelligent commentary without hype."
- "Informative, professional, had gravitas."

We also received some constructive feedback which will help us make future events even better.

90% of respondents would recommend the AI summit to a friend or colleague, that's an overwhelming yes! We'll take that as another win.

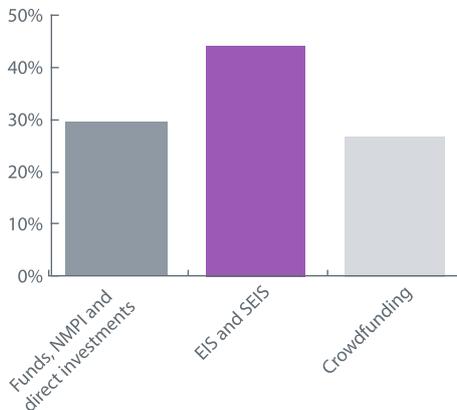
Would you recommend the Summit to a friend or colleague?



Source: Intelligent Partnership

Drilling down into what delegates most valued from the day; EIS and SEIS were most commonly ranked top (44%), followed by Funds, NMPI and Direct Investments on 29% with crowdfunding close behind on 27%.

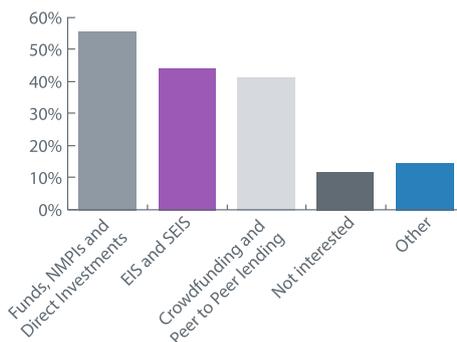
Please rank the subject areas in the order that you found most insightful



Source: Intelligent Partnership

As we specialise in providing reports, articles, videos and training on a number of alternative investment sectors this was an excellent opportunity to gauge exactly what financial advisers are after from our research. There was a large amount of demand from advisers for further accredited content and education on all of the sectors covered at the AISummit. 56% of respondents would like more information on Funds, NMPIs and direct investments, 44% on EIS and SEIS and 41% of crowdfunding (you could select more than one category). There was also demand from advisers for other areas, such as SIPP/SASS, more esoteric alternative markets and more in-depth research on the underlying assets, rather than just the investment structures themselves.

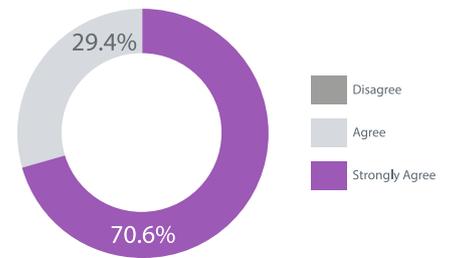
In which subject areas would you most value further accredited content and education?



Source: Intelligent Partnership

Here's the big one for us. As the alternative investment sector grows and develops away from its niche beginnings, delegate feedback suggests that it could increasingly have a place in the advice process alongside more mainstream investments. All respondents agreed that more advisers should be considering alternative investments for their clients. 70% felt strongly about it.

After attending the AI summit I agree that more IFAs should be considering alternative investments for their clients.



Source: Intelligent Partnership

That's our challenge then - to help more advisers do more for more clients in the alternatives sector. We're up for that challenge with a tonne of support and supporting materials.

So that's this year - what about the future? That's looking positive too. 82% of respondents said that they'd be attending, 12% were "Maybe's" and only 6% were not interested. We are pretty happy with that!

Listen out for more information on next years' event, keep a day (or two) spare in your diary next November.

Finally, thanks to all our speakers, everyone who helped organise the Summit, staff at the Barbican and of course all our delegates.



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