



SPONSOR GUIDANCE

Conference Introduction: We highly recommend that Sponsors attend the Conference Introduction, beginning at 3:00pm on Friday, in order to get the full benefit from the Conference.

Presentation Time: Presentations are 25 minutes in length. You will be advised at the end of 20 minutes to ask the audience if there are any questions. Unused question time can be used to complete your presentation. Additional questions may be generated by our members during our Closed Member Sessions. These questions will be handed out to the Sponsor in written form to be addressed during your 5 minutes time slot on our Sunday *Sponsor Final Thoughts* Session.

Who should make the Presentation: Your presentation should ideally be made by a member of senior management who is directly involved with implementing your investment strategy. While marketing or fundraising staff members or Managing Broker Dealer representatives are an important part of the process, your audience is looking for direct access to those in charge of implementing your investment strategy.

Presentation Goal: To provide the information necessary to persuade TNDDA Members to enter into the Due Diligence Process with you, with the execution of a Selling Agreement being the ultimate goal.

Know your Audience: You will be presenting to seasoned “decision makers” that know the basics. Typical titles are: Founder, Chairman, CEO, President, COO, CCO, Due Diligence Officer, Director Alternative Investments, Managing Principal, Partner and Director. These “decision makers” are responsible for what Sponsor Offerings are added to their firm’s Approved Products list. They are looking for what is unique about your firm/structure relative to others in your space, and what investor protections are contained in your investment structure.

Presentation Content: In this order: 1.) A quick summary of your current offering and offering structure, to set the stage for your presentation. 2.) A history of the people involved in the execution of your investment plan. 3.) What is the financial strength of the “offeror”? 4.) What is your “prior performance history” on the plan you will be implementing with investor dollars?

Presentation Style: Styles range from a single person informal oral presentation to a multi-person team presentation with PowerPoints, literature handouts, etc. The best presentation style is the one the presenter is most comfortable with.

Private Events: To ensure equal access to our Members, we ask that Sponsors not invite Members and Members not accept invitations to private events during our Conference Program.

Don’t Forget: Participation in all Conference events is important as it can provide several opportunities to meet and get to know our Members: Conference Introduction, five meals including two social events, Sunday Sponsor Final Thoughts, and most important, the three Sponsor Exhibit Sessions.