**TNDDA FAQs**

**Broker/Dealers, Advisors & Family Offices**

**(Revised 4/03/2024)**

**Q. Is there a cost for Broker/Dealers, Advisors and Family Offices to attend?**

**A. Broker/Dealer, Advisor and Family Office room charge, food and beverage, plus airfare (up to $600.00\*) is paid by TNDDA. (\*Ground transportation and parking not included.) There is a $725.00 fee for each Additional Attendee, and $250.00 for each Additional Guest.**

**Q. How long has TNDDA been holding Due Diligence Conferences?**

**A. Since March 2003. We have completed 63 Conferences.**

**Q. Who started TNDDA?**

**A. We were originally founded by seven (7) Broker/Dealers as a Non-Profit 501 (c) (6) Corporation.**

**Q. How many Sponsor presentations have there been at your Conferences?**

**A. 1,248 sponsor presentations.**

**Q. What kind of Sponsors present at your Conferences?**

**A. Generally, Alternative Investment Sponsors such as: Real Estate debt and equity partnerships and Non-Traded REITs, traditional oil & gas and alternative energy, corporate leasing and financing, venture capital, private equity, Business Development Corporations, life settlement, conservation easements, opportunity zones, managed equity and fixed income. Various service providers such as TPA’s, trust companies, due diligence firms, marketing and practice management consultants attend.**

**Q. What are the opportunities for Sponsors to interact with Broker/Dealers and Advisors during the Conferences?**

**A. A TNDDA Conference offers the following interaction opportunities: a 30 minute general introductory session, a 25 minute presentation time for each Sponsor, three 45 minute exhibit booth sessions and a wrap-up session of approximately 5 minutes for each sponsor at the end of the Conference. In addition, all meals and social times are common.**

**Q. May a Broker/Dealer, Advisor and Family Office attend a Conference without becoming a Member?**

**A. Yes. New Broker/Dealers, Advisors and Family Offices may come as a Guest. After attendance, guests are asked to become Members at a cost of $295.00 per year.**

**Q. Can Managing Broker/Dealers attend and become Members?**

**A. Not unless the Broker/Dealer also has a retail presence. Firms that are Managing Broker/Dealers only may attend with their Sponsor clients. Broker/Dealers who enter into Selling Agreements with Sponsors for which they do not provide Managing Broker/Dealer services may attend as Guests or Members.**

**Q. Are there sponsorship opportunities with individual Broker/Dealers, Advisors or Family Offices for events during the Conference?**

**A. We discourage invitations to Broker/Dealers, Advisors, and Family Offices for individual events during the Conference, as this gives each Sponsor equal access. There are Platinum, Gold, Silver, and Bronze sponsorship opportunities to host meals during the Conference (See Sponsor Registration Form for particulars).**

**Q. How often does TNDDA have Conferences?**

**A. TNDDA has three Due Diligence Conferences each year in March, July and November.**

**Q. Are your Conferences always in the same location?**

**A. No. We rotate our Conferences to give attendees in the Eastern, Middle and Western parts of the country convenient access.**

**Q. Who attends your Conferences from the Broker/Dealer, Advisor and Family Office community?**

**A. Broker/Dealers, Advisors and Family Offices that are interested in and sell Alternative Products attend our Conferences. We request that Principals and/or critical senior management personnel involved in the Selling Agreement approval process attend.**

**Q. How many Members attend your Conferences?**

**A. There is a list of our Members and recent Guests on this website. Most of the firms listed attend each Conference. Sponsors will be provided with complete contact information for each attendee and those Members and recent Guests not in attendance. We averaged 40 Firms.**

**Q. How many Sponsors attend your Conferences?**

**A. We averaged 22.**

**Q. Who attends your Conference representing a Sponsor?**

**A. We ask that Principals and/or critical members of the management operations team attend. Our Members prefer operations rather than sales and marketing members of the management team.**

**Q. Do law firms and analysts, that write research on Sponsors, attend our Conferences?**

**A. Yes. Law firms and analysts attend our Conferences.**

**Q. What is the unique value your Conferences provide to Broker/Dealers, Advisors and Family Offices?**

**A. After each group of Sponsor Presentations, Broker/Dealers, Advisors, and Family Offices hold a Closed Discussion Session (which includes Law Firms and Analysts), there is a peer discussion regarding each Presenting Sponsor. This discussion provides hundreds of years of experience from Principals and/or Senior Management regarding Sponsor presentations, business models and historical prospective on the Presenting Sponsors.**

**Q. What are “Shop Talk” Sessions?**

**A. Informal round table discussions on topics of interest to Broker Dealers, Advisors and Family Offices.**