

## 2025 Membership Brochure

### **Mission**

Our mission is to enhance and secure participant outcomes through education, research and advocacy on the benefits of including alternative investments like private equity/debt, real estate, hedge funds, and infrastructure within a defined contribution framework.

### **Enhancing Retirement Security**

The benefits to defined contribution (DC) participants are clear: the inclusion of a modest allocation of diversified, professionally managed alternative assets within a multi-asset portfolio, such as a target date suite or balanced fund, will likely enhance their retirement security. We are dedicated to finding solutions to help overcome market bias and operational impediments that may limit the use of alternative investments within DC plans.

### **Achieving our Mission**

*Through education, research, and advocacy, we work to:*

- Overcome the operational, educational and regulatory impediments that have limited the uptake of alternative investments in DC plans.
- Provide balanced information to educate the DC plan community, regulators and legislators on the benefits of including alternative investments in DC plans without bias for any product or solution.
- Conduct research that measures the impact of alternative investments on long term portfolios and investment structures, and how they can best be utilized in DC plans
- Present a collective industry perspective to advocate for prudent modernization of the laws and regulations that can enhance participant outcomes through the inclusion of alternative assets in DC plans

### **The Industry's Collective Voice**

Founded in 2015, DCALTA is a 501(c) non-profit organization composed of industry leaders from nearly all segments of the DC community, allowing us to represent the collective voice of the industry with a balanced view. Our members include a diverse range of plan sponsors, alternative investment firms, consultants, asset servicers, recordkeepers and other stakeholders in the DC community who support our mission. Our Board and President have extensive experience in retirement plan investment solutions, operational processes at the participant and trust fund levels and education on a global scale.

# **DCALTA**

Defined Contribution  
Alternatives Association

## **Why Join DCALTA?**

- Have input on the agenda and priorities of the industry's collective voice advocating for increased access to alternative assets in DC plans.
- Participate in our *Alts Implementation & Operations Committee* and the *Alts Technology & Innovations Committee*
- Participate in 3 DCALTA Meetings (2 persons) with virtual access when unable to attend in person (unlimited).
- Access past meetings and presentations on the DCALTA members-only site.
- Receive a 12 month subscription to the *Broadcast Retirement Network* and 20% off for all other colleagues.
- Ability to network and engage with other member firms and professionals.
- Be part of an organization advocating for investment diversification and access to alts for all retirement savers
- Frequent webinars on relevant topics impacting DC plans and alternative investments.
- Access to daily articles and the most recent research affecting alternative investments at [www.dcalta.org/research](http://www.dcalta.org/research).

## **Representative Organizations**

Adams Street Partners  
Alameda County  
Apollo Global Management  
Alliance Bernstein  
Ares  
Benefit Trust  
BlackRock  
Blackstone  
Bow River Capital  
Broadridge Financial Solutions  
Brookfield Asset Management  
CAIS  
Cambridge Associates  
Carlyle  
CBRE Investment Management  
CEM Benchmarking  
Clifford Chance  
DTCC  
Eli Lilly  
Fairway Capital Management  
Franklin Templeton  
FS Investments  
FTSE Russell  
Global Trust Company  
Goldman Sachs Asset Management  
Groom Law Group  
iCapital  
Institute for Portfolio Alternatives  
Institute for Private Capital  
Inveniam  
Invesco

JP Morgan Asset Management  
KKR  
M2M Capital  
Mars Corporation  
Mission Square  
Morningstar Indexes  
Nasdaq  
Natixis  
Neuberger Berman  
Nokia  
Northern Trust  
Nuveen  
Partners Group  
PGIM  
PIMCO  
PivotalPath  
Principal Real Estate Investors  
Rocket Dollar  
Spark Institute  
S&P Global Indices  
SEI  
Simpson Thacher  
StepStone Group  
Stout  
Textron  
UBS Realty Investors  
UMB Fund Services  
vWise  
University of California Regents  
VOYA Financial  
XTAL Strategies

## 2025 Membership Levels

### TIER #1

#### ASSET MANAGERS, CONSULTANTS AND RECORDKEEPERS

- Assets under advisement/management greater than \$50 billion USD
- \$12,000 annual membership

### TIER #2

#### ASSET MANAGERS, CONSULTANTS AND RECORDKEEPERS

- Assets under advisement/management between \$1 billion and \$50 billion USD
- \$8,000 annual membership

### TIER #3

#### ASSET MANAGERS, CONSULTANTS AND RECORDKEEPERS

- Assets under advisement/management under \$1 billion USD
- \$6,000 annual membership

### TIER #4

#### ASSET SERVICERS, NON-AUM FIRMS, INDICES & FINTECH FIRMS, LEGAL/ACCT.FIRMS

- \$4,000 annual membership

### TIER #5

#### PLAN SPONSORS AND INDIVIDUAL INDUSTRY PARTICIPANTS \*

- \$300 annual membership

\* Individuals who are retired and have served on the board

For further information on DCALTA membership please email [admin@dcalta.org](mailto:admin@dcalta.org) or contact our President, Jonathan Epstein at [je1@dcalta.org](mailto:je1@dcalta.org).