

2024 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.

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
CBRE Investment Management
CEM Benchmarking
Clifford Chance
Coinbase Institutional
DTCC
Eli Lilly
Fairway Capital Management
FEV Analytics
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
LaSalle Investment Management
Lockheed Martin Investment Management
M2M Capital
Montgomery County Employees` Retirement Plans
Mars Corporation
Mission Square
Morningstar Indexes
Nasdaq
Natixis
Neuberger Berman
Nokia
Northern Trust
Nuveen
PGIM
PIMCO
PivotalPath
Principal Real Estate Investors
Rocket Dollar
Spark Institute
S&P Global Indices
SEI
Simpson Thacher
StepStone Group
Textron
UBS Realty Investors
UMB Fund Services
University of California Regents
VOYA Financial
XTAL Strategies

2024 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 or contact our President, Jonathan Epstein at je1@dcalta.org.