

MARKETING FUNDS TO INSTITUTIONAL/PROFESSIONAL/QUALIFIED INVESTORS

(and managed accounts unless managed accounts listed as a separate session)

All sessions will be pre-recorded and made available to AIMA members on 11 May 2021. Sessions outlined are tiered based on the anticipated relative popularity.

Jurisdiction / Focus	Tier
UK	
<ul style="list-style-type: none"> Inbound from the EEA 	Tier 1
<ul style="list-style-type: none"> Inbound from anywhere but the EEA 	Tier 1
<ul style="list-style-type: none"> From inside the UK 	Tier 2
<ul style="list-style-type: none"> Managed accounts inbound from outside the UK 	Tier 2
USA	
<ul style="list-style-type: none"> Inbound from outside the USA 	Tier 1
<ul style="list-style-type: none"> From inside the USA 	Tier 2
<ul style="list-style-type: none"> Managed accounts for USA clients from outside the USA 	Tier 2
Luxembourg	
<ul style="list-style-type: none"> Inbound from the EEA 	Tier 2
<ul style="list-style-type: none"> Inbound from anywhere but the EEA 	Tier 2
Ireland	
<ul style="list-style-type: none"> Inbound from the EEA 	Tier 2
<ul style="list-style-type: none"> Inbound from anywhere but the EEA 	Tier 2
Belgium and Netherlands	
<ul style="list-style-type: none"> Inbound from the EEA 	Tier 2
<ul style="list-style-type: none"> Inbound from anywhere but the EEA 	Tier 2
Iceland, Norway and Finland	
<ul style="list-style-type: none"> Inbound from the EEA 	Tier 2
<ul style="list-style-type: none"> Inbound from anywhere but the EEA 	Tier 2
Sweden	
<ul style="list-style-type: none"> Inbound from the EEA 	Tier 2
<ul style="list-style-type: none"> Inbound from anywhere but the EEA 	Tier 2
Austria, Denmark and Germany	
<ul style="list-style-type: none"> Inbound from the EEA 	Tier 2
<ul style="list-style-type: none"> Inbound from anywhere but the EEA 	Tier 2
Switzerland	
Canada (including marketing to both professional and retail investors)	
Middle East	
China (ex-Hong Kong)	

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Hong Kong	Tier 2
Singapore	Tier 2
Japan	Tier 2
Australia	Tier 2
Latin America (Brazil, Chile and Peru)	Tier 2
South Korea	Tier 3
OTHER TOPICS	
Operational due diligence (ODD) in 2021	Tier 1
Websites (covering US, EU, UK, Hong Kong and Singapore rules or more focused separate sessions by country/region?)	Tier 1
Pitchbooks (covering US, EU, UK, Hong Kong and Singapore rules or more focused separate sessions by country/region?)	Tier 1
Social Media (covering US, EU, UK, Hong Kong and Singapore rules or more focused separate sessions by country/region?)	Tier 1
Oral communications and participation in live events (covering US, EU, UK, Hong Kong and Singapore rules or more focused separate sessions by country/region?)	Tier 1
Navigating compensation of marketing/sales personnel (EU/UK/US)	Tier 1
Using EU third-party fund platforms	Tier 2
IR technology	Tier 3
Retail distribution in the EU	Tier 3
Retail distribution in the UK	Tier 3
Retail distribution in the US	Tier 3
Streamlining investor onboarding	Tier 3
Sponsors choice, but with AIMA agreement on topic and cannot overlap any of the other offered sessions	Tier 3