

PRIVATE MARKETS *institute*

Presenting private markets

Introducing alternatives to your clients and business with confidence

Why participate in this program?

- · Investment opportunities in private markets continue to grow
- Advisors and the clients they serve can benefit from fundamental education about the value of private markets and alternative investments
- Nuveen's Private Markets Institute offers a range of actionable education and client communication tools

LEARNING OUTCOMES

Articulate the power and potential of alternative investments

Successfully engage clients and prospects on important private market and alternative investment concepts

Understand the implementation considerations that are unique to private markets

QUESTIONS ADDRESSED

How do I successfully engage clients who aren't yet private market investors?

How do I best position the asset allocation benefits?

How do I help clients understand how this differs from public investments? FORMAT

50-minute presentation, available live and on demand

One hour available CE credit for CFP and IWI, CPE credit for CPAs

Supplemental investorapproved education and supporting materials

The materials help me talk about complex topics in terms my clients can understand l am able to better engage with my high-net-worth relationships This helps my team better understand how alternatives can work alongside a traditional portfolio

Summary

Staying ahead in the advisory business requires offering solutions that set you apart. Understanding the evolving landscape of private market investments may present unique and compelling opportunities to enhance your clients' portfolios.

financial

advisors agree

providing access to

private market offerings

helped attract

high-net-worth clients¹

In this program we explore introducing private markets into your practice, effectively communicating their value, and considerations for implementation. Along the way we'll provide practical tips to support you in starting these important conversations.

This program supports:

Asset class insights

Financial planning

CE APPROVED 1 hour CFP, IWI and CPE for CPAs

Additional resources

Appropriate for use with clients, these materials can support your alternative investments conversations.



PRIVATE MARKETS INVESTOR BROCHURE

Private market investments offer unique opportunities for long-term investors. Learn more about how these assets may benefit your portfolio



PRIVATE CREDIT INVESTOR OVERVIEW

attractive complement to your portfolio

Understand private credit basics and how it may be an

NUVEEN: A LONG-TIME LEADER IN ALTERNATIVES INVESTING

> in assets under management

in real estate

\$120B in private capital

in real assets

As of 30 Jun 2024.

nuveen		
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PRIVATE REAL ESTATE INVESTOR OVERVIEW

Private real estate essentials: The benefits of real estate without the hassles that come with owning property

Contact your Nuveen Advisor Consultant today at 800.221.9271 for more information.

About Nuveen Advisor Education

Nuveen brings our financial professional partners – and their valued clients – experienced subject matter experts ready to share actionable, field-tested ideas, insights and education. Whether it's a focus on enhancing an advisor's practice, acquiring new clients or leveraging current market and asset class insights, Nuveen offers timely, relevant and innovative content.

We look forward to partnering with you.

1 Source: Cerulli; Adapting to Growing Private Markets: A Playbook for Practice Success; 2023.

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