



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 investor-approved education and supporting materials



providing access to
private market offerings
helped attract
high-net-worth clients'

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.

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.

The materials help me talk about complex topics in terms my clients can understand

I 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

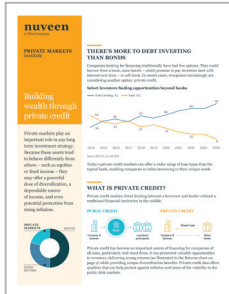
Additional resources

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

Understand private credit basics and how it may be an attractive complement to your portfolio



PRIVATE REAL ESTATE INVESTOR OVERVIEW

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

**NUVEEN: A LONG-TIME LEADER
IN ALTERNATIVES INVESTING**

\$294B

*in assets under
management*

\$143B

in real estate

\$120B

in private capital

\$31B

in real assets

As of 30 Jun 2024.

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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NOT FDIC INSURED | NO BANK GUARANTEE | MAY LOSE VALUE

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