

IMA Purpose, Goals & Objectives

Believing in the importance and value
of investment management



A new statement of purpose, reflecting the importance of investment management, inspiring us to strive for fiduciary excellence and better outcomes for our clients and stakeholders...



WE BELIEVE OUR PURPOSE IS IMPORTANT

The IMA's purpose is to ensure investment managers are in the best possible position to....

- Build people's resilience to financial adversity
- Help people achieve their financial aspirations
- Enable people to maintain a decent standard of living as they grow older
- Contribute to economic growth through the efficient allocation of capital



Clients & Beneficiaries

Delivering financial resilience
confidence and security

Government

Economic growth, jobs, tax revenues
and reduced State dependency

Regulators, Officials, Politicians

Looking after consumers and
helping them achieve their objectives

Members

Sustainable and profitable businesses

...delivering value for clients, our members, our industry and the economy



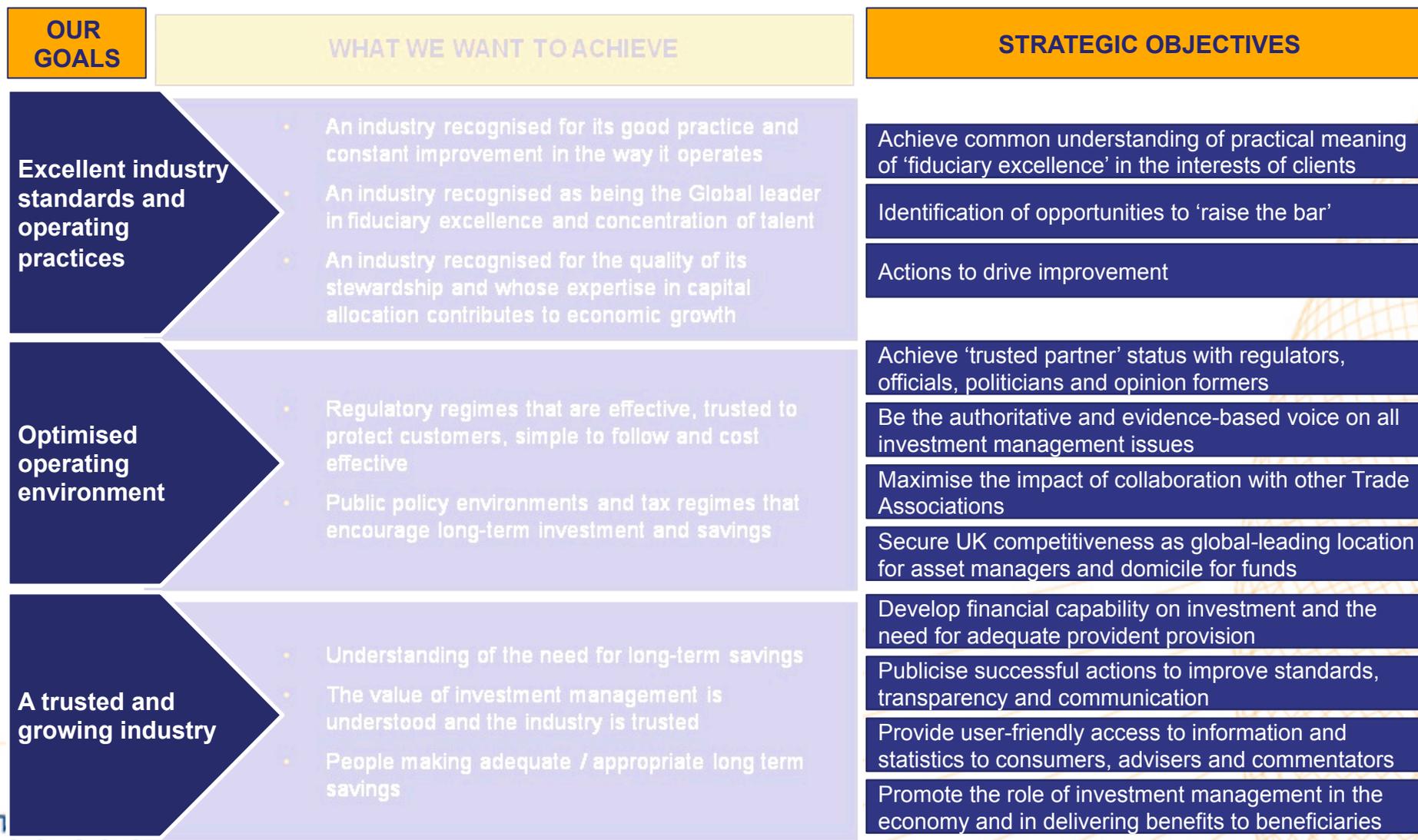
We have set three stretching, long-term goals which shape the actions that drive us towards our purpose



OUR GOALS	WHAT WE WANT TO ACHIEVE
Excellent industry standards and operating practices	<ul style="list-style-type: none">• An industry recognised for its client focus and constant improvement in the way it operates• An industry recognised as being the Global leader in fiduciary excellence and concentration of talent• An industry recognised for the quality of its stewardship and whose expertise in capital allocation contributes to economic growth
Optimised operating environment	<ul style="list-style-type: none">• Regulatory regimes that are effective, trusted to protect clients, simple to follow and cost effective• Public policy environments and appropriate tax regimes that encourage long-term investment and savings
A trusted and growing industry	<ul style="list-style-type: none">• Understanding of the need for long-term savings• The value of investment management is understood and the industry is trusted• People making adequate / appropriate long-term savings



In the medium-term we have identified the strategic objectives that take us towards our purpose...



Our long-term goals enable us to articulate a vision of what we want the future to look like



OUR VISION OF THE FUTURE

“The IMA will have played a key role in the development of the UK investment management industry as a centre of excellence with World-leading standards of governance and integrity, the best international talent and outstanding support services.

The industry will be recognised for playing a significant and positive role in our clients’ personal financial success and, through good stewardship and capital allocation, to the economy.

We will operate in secure but cost effective regulatory environments that do not create unnecessary distractions for management. Tax regimes will be positive insofar as they are consistent with the reduction in dependency on the state.

People will have access to information and education to help them understand both the need to save and the value of the investment management industry. The industry will provide excellent communications with simple and transparent information and the market for long term savings will continue to grow globally with UK asset managers being the strongest competitors in the market from a position of trust, confidence and competence.”