The financial industry's gathering place where advanced investment and wealth management professionals transform knowledge into value.

INVESTMENTS & WEALTH INSTITUTE™
formerly IMCA

2018 MEDIA KIT

PARTNER • SPONSOR • EXHIBIT • EDUCATE • ADVERTISE • RESEARCH

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CONTENTS

ABOUT

CONFERENCE SPONSORSHIPS & EXHIBITS

PARTNERSHIPS

PUBLICATIONS & ADVERTISING

RESEARCH

CERTIFICATIONS

DESIGNATIONS

ASSESSMENT-BASED CERTIFICATE PROGRAMS

APPENDIX

WELCOME!

When you think about the Investments & Wealth Institute , we would like you to consider that for over 30 years we have been dedicated to serving the educational needs of advanced investment and wealth professionals.

What is unique about the Institute is that we take an "Ivy League" approach to education, partnering with top 20 business schools such as: The Wharton School, University of Pennsylvania, The University of Chicago Booth School of Business, and the Yale School of Management. We continue to see strong growth in our CIMA® and CPWA® designations, which have become more relevant than ever in the new Department of Labor fiduciary environment. At the Investments & Wealth Institute, we are continually striving to improve our programs, conferences, and online education to better serve our 11,000+ members and certificants. In our efforts to better serve our members and expand our educational offerings, we recently acquired the Retirement Management Advisor℠ designation, and Yale School of Management will begin offering an online CPWA program in 2018.

For marketers, the Institute offers a variety of powerful opportunities to help you build brand exposure among a desirable group of high-end investment advisors and consultants from all advisory channels. These seasoned professionals have extraordinary levels of assets under management (AUM) and a passion to serve their clients in an exceptional way.

We hope you will consider supporting the Institute through one of our partner programs, or by sponsoring or exhibiting at one of our many 2018 events. With your help, together we can continue to raise the knowledge bar for our entire industry.

CHICAGO BOOTH The University of Chicago Booth School of Business

Wharton University of Pennsylvania Aresty Institute of Executive Education

Yale SCHOOL OF MANAGEMENT Executive Education

UTS UNIVERSITY OF TECHNOLOGY, SYDNEY

Registered education providers as of September 1, 2017

INSTITUTE MEMBER PROFILE

12,000+ MEMBERS & CERTIFICANTS[1]

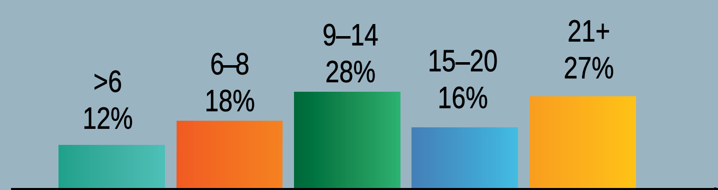
7,500+ CIMA® CERTIFICANTS[1]

1,300+ CPWA® CERTIFICANTS[1]

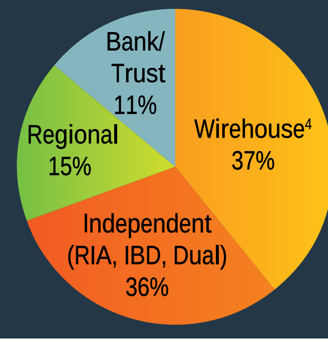
COLLECTIVELY MANAGE **$2.477 TRILLION**[2]

$364 MILLION AVERAGE AUM[2]

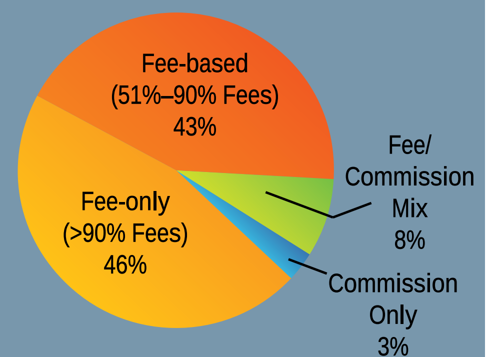
71% HAVE
9+ YEARS OF EXPERIENCE[3]



REPRESENT ALL
ADVISORY CHANNELS[2]

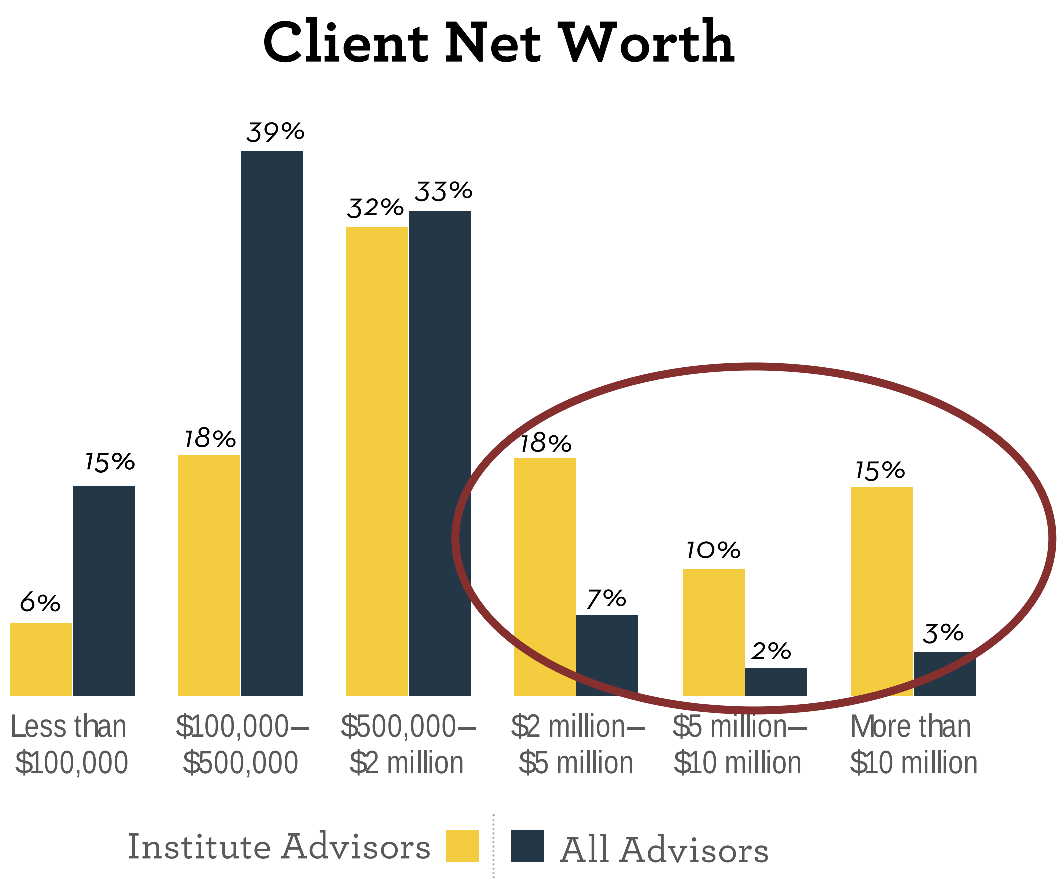


FEE STRUCTURE



Sources: 1. Institute, as of August, 2017. 2. Cerulli Associates. 3. Aite Group. 4. Wirehouse composition: 14% Bank of America/Merrill Lynch, 12% Morgan Stanley, 8% UBS, 6% Wells Fargo

INSTITUTE MEMBERS SERVE THE AFFLUENT



KEY STATISTICS

- Institute members manage more assets for affluent clients than the average advisor
- 75% of Institute members' clients have a net worth between $500,000 and $10 million+
- 9% of Institute members' business is from institutional clients

25% of Institute Members Serve High-Net-Worth Clients.

Institute Members Have Greater Wallet Share.

CONFERENCE SERIES

INVESTMENT ADVISOR FORUM	Dates	Venue	Attendees	Exhibitors
Investment advisors and wealth managers are drawn to this long-standing marquee New York metropolitan-area event. An impressive lineup of speakers covers a variety of topics including portfolio management, alternative investments, investment allocation, investment policy, wealth management, and timely discussions about the U.S. and world economies. *Sponsor: $25,000* *Exhibitor: $15,000*	January 16–17, 2018	Marriott Marquis, New York, NY	900	30
ANNUAL CONFERENCE EXPERIENCE—ACE				
The Institute's Annual Conference Experience is the largest association gathering of investment and private wealth advisors in the industry. Sessions feature leading industry strategists, academic thought leaders, and existing or future Nobel laureates. Our exhibit hall prominently features trend-setting products and services from more than 100 supporting firms. *Sponsor: $35,000* *Exhibitor: $15,000*	May 6–9, 2018	Music City Center Nashville, TN	1,500+	100+

CONFERENCE SERIES (CONTINUED)

WEALTH ADVISOR FORUM				
A must-attend event that is designed for Institute members, CPWA designees, wealth managers, and top advisors who manage the complex needs of high-net-worth clients. The Institute's Private Wealth Advisor Conference will discuss the most critical topics in wealth management today. *Sponsor: $20,000* *Exhibitor: $12,000*	October 29–30, 2018	Fairmont Scottsdale Princess Scottsdale, AZ	450	30
ADVANCED BUSINESS STRATEGIST WITH WHARTON				
Presented by academic faculty from Wharton and supplemented by business coaches, consultants, and leading practitioners, this program is for senior-level registered investment advisors and team leaders who are dedicated to acquiring the knowledge and skills necessary to build their practice into a business, or their business into an enterprise. *First Rights: Platinum and Gold Partners Only* *Additional sponsors subject to availability: $15,000*	September 2018	Philadelphia, PA	175	8
RETIREMENT MANAGEMENT FORUM				
Retirement Management Forum features practitioner-oriented sessions across the broad spectrum of retirement-management topics, specifically chosen for those engaged in holistic retirement planning. Topics include a mix of investment strategies, wealth management, retirement income, and risk management. *First Rights: Platinum and Gold Partners Only* *Additional sponsors subject to availability: $15,000*	December 2018	TBD	200	8

CONFERENCE SPONSORSHIPS & EXHIBITS

Sponsorships are designed for organizations interested in having a marquee presence at specific Institute events. As our most widely attended event, the Annual Conference Experience provides you with the greatest exposure, while our specialty conferences provide focused educational content in a more intimate setting. Exhibit opportunities are also available for the Annual Conference Experience, Investment Advisor Forum and Wealth Advisor Forum.

ANNUAL CONFERENCE EXPERIENCE—ACE

MAY 6–9, 2018, MUSIC CITY CENTER, NASHVILLE, TN

Sponsors at Annual Conference Experience receive extensive marketing exposure through a variety of promotional channels. More than one-half million impressions are generated through conference promotions.

Benefits	ANNUAL CONFERENCE EXPERIENCE SPONSOR $35,000	ANNUAL CONFERENCE EXPERIENCE EXHIBITOR $15,000
Exhibit booth	20′×10′	10′×10′
Option to purchase additional exhibit space	●	●
Complimentary registrations	4	2
Discounts on publication sponsorships	10%	
Company item included in attendee conference bags, boxes or folders (item must be pre-approved)	●	
Color logo on conference pages of website with link to firm homepage	●	LISTING WITH LINK
Color logo in brochure	●	
Color logo and firm description in printed onsite materials	●	DESCRIPTION ONLY
Color logo and firm description in conference app with link to firm homepage	●	DESCRIPTION & LINK ONLY
Verbal sponsor recognition and color logo featured in select slide shows	●	
One bonus included branding opportunity (see appendix)	●	
Rights to pre- and post-conference use of attendee list (mailer must be pre-approved, no email addresses are released)	2X	1X
Opportunity to recommend a speaker/topic from your firm for a 20 minute education in the hall session (Subject to availability and the Institute must approve the speaker/topic)	●	

CONFERENCE SPONSORSHIPS & EXHIBITS

	CONFERENCE SPONSOR	CONFERENCE EXHIBITOR
Investment Advisor Forum, January 16–17, 2018, New York Marriott Marquis, NY	**$25,000**	**$15,000**
Wealth Advisor Forum, October 29–30, 2018, Fairmont Scottsdale Princess, AZ	**$20,000**	**$12,000**
Advanced Business Strategist with Wharton, September 2018, Philadelphia, PA	**$15,000**	**N/A**
Retirement Management Forum, December, TBD	**$15,000**	**N/A**
Benefits at each conference		
One 6' tabletop exhibit at conference	●	●
Complimentary registrations	3	2
Discounts on publication sponsorships	5%	
Verbal sponsor recognition and color logo featured in select slide shows	●	
Color logo on conference pages of website with link to firm homepage	●	Listing with link
Logo in conference promotional materials	●	
Logo and description in onsite materials	●	Description only
Color logo and firm description in conference app with link to firm homepage	●	Description and link only
Rights to pre- and post-conference use of attendee list (mailer must be pre-approved, no email addresses are released)	2x	1x

FOCUS SERIES

FOCUS SERIES IN-PERSON	Dates / Venue	Topic	Attendees	Exhibitors
	March, San Francisco	Focus on Monetizing Closely-held Businesses	100–150 per event	up to 10 per event
	June*	TBD		
	July, Chicago	Focus on Advanced Portfolio Construction with ETFs		
	August*	TBD		
	November, Atlanta	Focus on Advising the Great Wealth Transfer		

Disruptive Trends in regulation, investing, wealth management, business, and technology

With a focus on deep-dive topics explored by leading subject matter experts, these one-day seminars have become among the Institute's most popular and highest-rated offerings. Align your firm's brand and thought leadership with any number of topics that will profoundly change the practice of investment and wealth management.

*Exclusive Sponsor. Dates and locations TBD. The Institute will handle all arrangements.

NOTE: TOPICS AND CITIES SUBJECT TO CHANGE

Benefits at each event:	EXCLUSIVE SPONSOR $75,000 PER EVENT	SPONSORSHIP $15,000 PER EVENT	EXHIBITOR $7,500 PER EVENT
One 6' tabletop exhibit at conference	●	●	●
Complimentary registrations	25	3	2
Discounts on publication sponsorships	5%	5%	
Verbal sponsor recognition and color logo featured in select slide shows	●	●	
Color logo on conference pages of website with link to firm homepage	●	●	Listing with link
Logo in conference promotional materials	●	●	
Logo and description in onsite materials	●	●	Description only
Color logo and firm description in conference app with link to firm homepage	●	●	Description and link only
Rights to pre- and post- conference use of attendee list (mailer must be preapproved, no email addresses are released)	2x	2x	1x

FOCUS SERIES (CONTINUED)

Focus Series Online

In addition to live and in--person Focus events, in 2018 we will also offer sponsorship of "online only" Focus events. Several one-hour webcasts will be delivered in succession, on the same day. This format allows for convenient access to a variety of topics, including current events, market outlooks, and disruptive trends. Participants have the flexibility of attending some, or all of the sessions. Interactive chat is available with the presenters to enhance engagement.

Focus Online Exclusive Sponsorship: $30,000 per event

Sponsor Rights and Benefits

Ability to provide content (with the Institute's review and approval).
Sponsor recognition in pre-event registration marketing.
Recognition during day-of-event activities.

- Verbal sponsor recognition during sessions and color logo featured in slide shows.
- Opportunity to offer participants downloadable content assets.
- Complimentary registrations to sessions for your firm and your clients.
- Access to archives.
- Rights to post-event attendee list.

WEALTH MANAGEMENT	INVESTMENT MANAGEMENT	RETIREMENT MANAGEMENT
FEBRUARY 2018	**APRIL 2018**	**AUGUST 2018**
Session Topic: Focus on U.S. Tax Changes	**Session Topic:** Focus on Quantitative Tightening	**Session Topic:** Retiring in a Low-Yield Environment
Description: It's probably too late to plan much for the 2017 tax year, but you can still make a big impact on your clients' 2018 tax planning. In this online event, you can update your 2018 tax outlook and hear experts' insight on recent (or upcoming) changes to the tax code. More importantly, you'll learn practical strategies for managing tax brackets, planning for AMT, and reducing estate tax/GST.	**Description:** The use of Quantitative Easing (QE) by global central banks after the financial crisis was unprecedented. Now that the U.S. Federal Reserve is hinting at being the first to unwind their policies, investors are left to forecast what the effects of Quantitative Tightening (QT) will be. Join our panel of experts as they share their views on the range of potential outcomes, as well as opportunities for positioning your clients' portfolios.	**Description:** Let's face it – the current low-yield environment makes for some tough choices for your retiring clients. With an aging population and increasing longevity, the value of smart advice is higher than ever. In this online event, you'll learn best practices from practitioners as well as the latest research from academics. Topics include strategies for decumulation, healthcare planning, and creating retirement income.

2018 EVENT PLANNER

	January	February	March	April	May	June	July	August	September	October	November	December
Conferences	Investment Advisor Forum Jan 16–17 New York				Annual Conference Experience May 6–9 Nashville				Advanced Business Strategist Philadelphia	Wealth Advisor Forum Arizona		Retirement Management Forum
Focus Series		Focus Online Focus on U.S Tax Strategies.	Focus on Monetizing Closely-held Businesses. San Francisco, CA	Focus Online Focus on Quantitative Tightening.			Focus on Advanced Portfolio Construction with ETFs. Chicago, IL	Focus on Online Retiring in a Low-Yield Environment.			Focus on Advising the Great Wealth Transfer. Atlanta, GA	
Exclusive Sponsored Focus On Events						Focus On TBD		Focus On TBD				

PARTNERSHIP

Organizations interested in maximizing their brand exposure to the Institute's influential members throughout the entire calendar year have a variety of partner programs to choose from. Able to accommodate a range of budgets, each partnership provides a significant bundle of valuable rights and benefits, including thousands of impressions through the Institute's website, conference app, onsite signage, publication, print and digital communications, and more.

PLATINUM PARTNER $120,000

BENEFITS	ANNUAL CONFERENCE EXPERIENCE—ACE	INVESTMENT ADVISOR FORUM	WEALTH ADVISOR FORUM	CHOICE OF ONE ABS OR RETIREMENT EVENT	CHOICE OF TWO FOCUS SERIES EVENTS
Booth/table	One 20'×20' island booth in prominent location	First choice of 6' tabletop exhibit location	First choice of 6' tabletop exhibit location	First choice of 6' tabletop exhibit location	First choice of 6' tabletop exhibit location
Complimentary registrations	5	3	3	2	2
Logo to appear on conference materials (e.g., bags, boxes, folders) where they are distributed	●	●	●		
Company item provided by sponsor included in attendee conference bag, boxes or folders at conferences where they are distributed (item must be preapproved)	●	●	●		
Recognition and/or color logo on conference pages of the Institute website	●	●	●	●	●
Recognition and/or color logo on conference emails, including confirmation and post event thank you	●	●	●	●	●
Recognition and/or color logo on onsite event slide show and verbal recognition from main stage	●	●	●	●	●
Rights to two-time, pre- and post-conference use of attendee list (mailer must be preapproved, no email addresses are released)	●	●	●	●	●

PLATINUM PARTNER $120,000 (CONTINUED)

BENEFITS	ANNUAL CONFERENCE EXPERIENCE—ACE	INVESTMENT ADVISOR FORUM	WEALTH ADVISOR FORUM	CHOICE OF ONE ABS OR RETIREMENT EVENT	CHOICE OF TWO FOCUS SERIES EVENTS
Recognition and color logo in conference promotional material	●	●	●	●	●
Recognition and color logo placement on conference signage	●	●	●		
Recognition, color logo, and firm description in onsite materials	●	●	●	●	●
Recognition, color logo, and firm description in conference app	●	●	●	●	●
One banner advertisement featured in conference app with click-through to company website (ad designed by the Institute)	●	●	●	●	●
Link to company-sponsored handouts from the conference app (handouts must be preapproved)	3	1	1	1	1
One customized message alert to display on the conference app to drive attendance to booth (message alert must be preapproved)	●	●	●	●	●
Signature drink and appetizer served exclusively in your booth during one evening reception (night TBD)	●				
Opportunity to recommend a speaker/topic from your firm for a 20 minute education in the hall session (Subject to availability and the Institute must approve the speaker/topic)	●				

Other Benefits

- **Recognition and/or color logo on homepage of the Institute website**
- **One included branding opportunity—Platinum Partners get priority selection on this opportunity (see separate list of items—not available at Focus Series events)**
- **15% discount on publication sponsorships**
- **Platinum Partner recognition and/or color logo in 26 issues of SmartBrief**
- **25% discount for any employee or affiliate toward online learning programs including: Applied Behavioral Finance, Essentials of Investment Consulting, Fundamentals of Exchange-listed Options**

GOLD PARTNER $100,000

BENEFITS	ANNUAL CONFERENCE EXPERIENCE—ACE	INVESTMENT ADVISOR FORUM	WEALTH ADVISOR FORUM	CHOICE OF ONE ABS OR RETIREMENT EVENT	CHOICE OF ONE FOCUS SERIES EVENT
Booth/table	One 20'×10'island booth in prominent location	6' tabletop exhibit location	6' tabletop exhibit location	6' tabletop exhibit location	6' tabletop exhibit location
Complimentary registrations	4	3	3	2	2
Company item provided by sponsor included in attendee conference bag, boxes or folders at conferences where they are distributed (item must be preapproved)	●	●	●		
Recognition and/or color logo on conference pages of the Institute website	●	●	●	●	●
Recognition and/or color logo on onsite event slide show, verbal recognition from main stage	●	●	●	●	●
Rights to two-time, pre- and post-conference use of attendee list (mailer must be preapproved, no email addresses are released)	●	●	●	●	●
Recognition and color logo in conference promotional material	●	●	●	●	●
Recognition and color logo placement on conference signage	●	●	●		
Recognition, color logo, and firm description in on site materials	●	●	●	●	●
Recognition, color logo, and firm description in conference app	●	●	●	●	●
Opportunity to recommend a speaker/topic from your firm for a 20 minute education in the hall session (Subject to availability and the Institute must approve the speaker/topic)	●				

Other Benefits

- **One included branding opportunity (see separate list of items—not available at Focus Series events)**
- **10% discount on publication sponsorships**
- **25% discount for any employee or affiliate toward online learning programs including: Applied Behavioral Finance, Essentials of Investment Consulting, Fundamentals of Exchange-listed Options**

SILVER PARTNER $80,000

BENEFITS	ANNUAL CONFERENCE EXPERIENCE—ACE	INVESTMENT ADVISOR FORUM	WEALTH ADVISOR FORUM	CHOICE OF ONE FOCUS SERIES EVENT
Booth/table	One 10'×10" booth in prominent location	6' tabletop exhibit location	6' tabletop exhibit location	6' tabletop exhibit location
Complimentary registrations	3	3	3	2
Recognition and/or color logo on conference pages of the Institute website	●	●	●	●
Recognition and/or color logo on onsite event slide show, verbal recognition from main stage	●	●	●	●
Rights to two-time, pre- and post-conference use of attendee list (mailer must be preapproved, no email addresses are released)	●	●	●	●
Recognition and color logo in conference promotional material	●	●	●	●
Recognition and color logo placement on conference signage	●	●	●	
Recognition, color logo, and firm description in on site materials	●	●	●	●
Recognition, color logo, and firm description in conference app	●	●	●	●
Opportunity to recommend a speaker/topic from your firm for a 20 minute education in the hall session (Subject to availability and Institute must approve the speaker/topic)	●			

Other Benefits

- **One included branding opportunity (see separate list of items—not available at Focus Series events)**
- **5% discount on publication sponsorships**
- **10% discount on additional conferences not included in Silver Partnership**
- **25% discount for any employee or affiliate toward online learning programs including: Applied Behavioral Finance, Essentials of Investment Consulting, Fundamentals of Exchange-listed Options**

BRONZE PARTNER $45,000

BENEFITS	ANNUAL CONFERENCE EXPERIENCE—ACE	INVESTMENT ADVISOR FORUM	WEALTH ADVISOR FORUM
Booth/table	One 10'×10' booth with option to upgrade	6' tabletop exhibit with option to upgrade	6' tabletop exhibit with option to upgrade
Complimentary registrations	3	2	2
Priority selection of booth or tabletop before other exhibitors	●	●	●
Recognition and/or color logo on select slide shows at events	●	●	●
Rights to one-time, pre- and post-conference use of attendee list (mailer must be preapproved, no email addresses are released)	●	●	●
Recognition and firm description in on site materials	●	●	●
Recognition, color logo, and firm description in conference app	●	●	●

Other Benefits

- **5% discount on publication sponsorships**
- **10% discount for any employee or affiliate toward online learning programs including: Applied Behavioral Finance, Essentials of Investment Consulting, Fundamentals of Exchange-listed Options**

CORPORATE PARTNER $15,000 PER YEAR PER FIRM ($10,000 PER YEAR FOR EACH ADDITIONAL SUBSIDIARY FIRM)

CORPORATE PARTNERSHIP

Becoming an Institute Corporate Partner shows your organization's support of advanced education for the investments and wealth profession and the advisor community we represent. Your Corporate Partnership provides your firm a host of rights and benefits as well as a voice within our organization. Participation is open to all types of firms, including but not limited to: asset management firms and product manufacturers, broker-dealers and other sponsor firms, advisory solutions providers, custodians, RIA firms, legal firms, technology and service vendors, research firms, and other allied to the industry. Corporate Partnership is not available to individual advisors or investors. Platinum, Gold, Silver, and Bronze partners will automatically receive Corporate Partnership as part of their rights and benefits.

Please note that the Institute policy does not allow active recruiting efforts and has a strict privacy policy for its individual members.

BENEFITS
Five (5) complimentary individual memberships (does not apply for existing members)
Five (5) print subscriptions to *Investments & Wealth Monitor* and *Investments & Wealth Research*
25 Digital subscriptions to *Investments & Wealth Monitor* and *Investments & Wealth Research*
Access to research reports (Aite, Cerulli, Teams, HNW Investors, Member surveys)
Unlimited digital subscriptions to Investments & Wealth Insight, Legislative Intelligence, Investment Sense Blog
$1,000 discount off published fee to exhibit at each of the following events: Investment Advisor Forum, ACE, Wealth Advisor Forum –or– one additional attendee registration at any of these events with your paid exhibit (Not applicable to Platinum, Gold, Silver, or Bronze Partners.)
Participation in one of two Strategic Advisory Councils. Limited to one member per firm. Quarterly conference calls will be: Strategic Investments & Wealth Advisory Council Strategic Retirement Advisory Council
Logo, listing, and link on www.investmentsandwealth.org
Corporate Partner page. A link to the Corporate Partner page will be featured in various communications throughout the year
Ability to post one white paper within Corporate Partner Resources page
Opportunity to propose and potentially present on-demand webinar in our Online Learning Center. Topic and Presenter must be approved by the Institute and subject must fit within the Investments & Wealth Competency Matrix

PUBLICATIONS & ADVERTISING

Investments & Wealth Monitor—Published bimonthly (six issues per year) *Investments & Wealth Monitor* is an exclusive benefit for Institute members. Each issue reaches an elite audience of investment consultants and wealth management professionals. With a limited number of ad positions available, *Investments & Wealth Monitor* offers your brand one of the best ad-to-editorial ratios in the industry, as well as an uncompromised, 100% peer-reviewed editorial environment.

Advertisers receive digital exposure! All print advertisers' ads will appear in the digital and mobile app editions for iPhone and iPad, Android, and Kindle. Your logo also will be featured on the *Investments & Wealth Monitor* section of the Institute's website, **www.investmentsandwealth.org**.

ISSUE	EDITORIAL FOCUS	RESERVATIONS DUE	MATERIALS DUE
January/February	Disruptive Trends	November 10, 2017	December 1, 2017
March/April*	Investment Implications of Geopolitics	January 12, 2018	February 2, 2018
May/June*	Advisor of the Future	March 9, 2018	April 6, 2018
July/August	Evolution of Indexing	May 11, 2018	June 1, 2018
September/October*	Fiduciary/ Regulatory	July 13, 2018	August 3, 2018
November/ December*	International Investing	September 14, 2018	October 1, 2018

**Investments and Wealth Research* polybags with issue.

PRINT EDITION: FULL-PAGE, FOUR-COLOR RATES (NET)	FREQUENCY: 3X	FREQUENCY: 6X
Standard Page (Inside)	$3,500	$3,150
Table of Contents (TOC)	$3,850	$3,465
Cover 2 (Inside Front Cover)	$5,625	$5,062
Cover 3 (Inside Back Cover)	$5,625	$5,062
Cover 4 (Back Cover)	$6,625	$5,962

Note: All rates are net. Covers and premium positions are non-cancellable.

The Institute does not endorse any products or services advertised in *Investments & Wealth Monitor*. Advertisements must be used only for the purpose of promoting the advertiser's products or services and are not to be used for recruiting. The Institute reserves the right to approve or reject any advertisement.

PUBLICATIONS & ADVERTISING (CONTINUED)

Digital Edition and Mobile App Sponsorship: $12,000
Looking for an exclusive way to feature your brand in a digital environment for an entire calendar year? *Investments & Wealth Monitor* Digital Edition and Mobile App Sponsorship is reserved for a single firm that will receive sponsorship recognition and a company logo displayed on the *Investments & Wealth Monitor* section of the Institute's website. Your online ad will appear next to the publication cover of the digital edition and buttons and leaderboard ads will run throughout the pages. You also have the ability to embed video. On the Mobile App, in addition to an ad next to the publication cover, your firm will receive a launch image and banner ads on the search and bookmarks.

***Investments & Wealth Research* Annual Sponsorship: $20,000 Cover 4; $14,000 Cover 3**
Published quarterly (four issues per year) and distributed as a supplement to *Investments & Wealth Monitor*, *Investments & Wealth Research* provides custom research describing demographic and best practice information about Institute members and how they deliver investment consulting and wealth management services. As an exclusive member benefit, *Investments & Wealth Research* is distributed to the Institute's elite membership of investment consultants and wealth management professionals. This research series is published in partnership with the leading industry researcher, Cerulli Associates.

Sponsorship includes a full-page, four-color ad in all four quarterly editions. Exposure is also provided through sponsorship recognition on the Institute website (logo recognition) and through the digital edition and mobile app edition for iPhone, iPad, Android, and Kindle.

PUBLICATIONS & ADVERTISING PRODUCTION INFORMATION

GENERAL REQUIREMENTS:

Only full-page ads accepted
Trim Size: 8.375 x 10.875"
Binding Method: Perfect
Printing Process: CMYK

BLEED AD SIZES:

Trim size: 8.375 x 10.875"
Bleed size: 8.625 x 11.125"
Live area:
7.875 x 10.375" (outside back cover)
7.375 x 10.375" (inside covers)

NON-BLEED AD SIZES:

Trim size: 8.375 x 10.875"

SHIPPING INSTRUCTIONS

MATERIALS SENT TO:

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INVESTMENTS & WEALTH RESEARCH

CUSTOM RESEARCH ISSUE

Do you have white papers or industry benchmark research that you would like to get in front of our influential members?

In addition to the regularly published issues of *Investments & Wealth Research*, we can also take your credible and/or third party research and publish a special issue of *Investments & Wealth Research* which will be printed, polybagged, and mailed with a select issue of *Investments & Wealth Monitor* to our members. The content will also be available digitally on **www.investmentsandwealth.org**.

Custom Research Issue Sponsorship: $50,000 per issue.
Don't have research available? We can help through our partnerships with Aite, Cerulli, Koski, Absolute Engagement, and other reputable third party research firms. Custom research pricing will depend on scope of work.

RESEARCH INDUSTRY BENCHMARK STUDIES AND CUSTOM SURVEYS

Whether your needs are for tactical decision making or for purposes of establishing thought leadership positioning, our subject matter experts will coordinate with industry-recognized independent third-party research firms with established Institute relationships to design a program tailored to your needs. Pricing is quoted on the scope of work, but typically ranges from $50,000 to $100,000 per project.

- The Institute's members provide a ready base of influential high-end advisors whose opinions and actions can provide valuable insight.
- With a full-range of industry-standard capabilities, the Institute can provide both qualitative and quantitative research.
- Uncover trends, provide actionable data to assess existing products and services, or help determine new market potential.
- Benchmark reports, custom research, white papers, panels, and round table discussions.

Janus Henderson INVESTORS

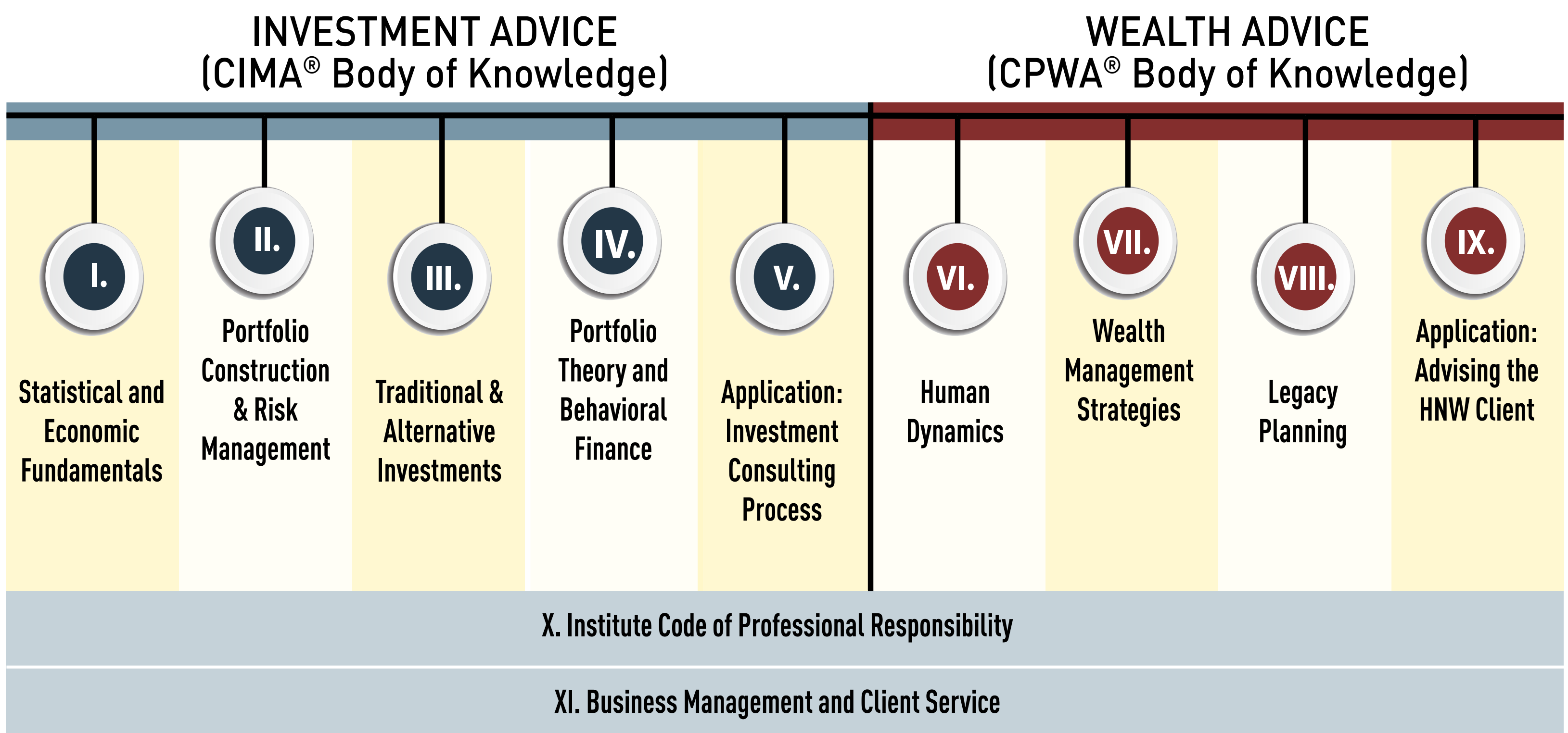
CA CERULLI ASSOCIATES

Aite

INVESTMENTS & WEALTH COMPETENCY MATRIX

All Institute professional development offerings map to this matrix, which is updated after each job analysis

As the premier certifying body and community for advanced investment and wealth management professionals, the Institute has the capability to support your organization's educational needs. Preferential pricing is available for all sizes of groups interested in our certification and certificate programs. Whether you have a cohort of advisors interested in a private CIMA or CPWA class, or a group of wholesalers or internal staff interested in increasing their knowledge base of the investment consulting process, behavioral finance, or alternative investments, the Institute can develop an appropriate solution for you.



CIMA®

CERTIFIED INVESTMENT MANAGEMENT ANALYST®

ANSI ACCREDITED

Accreditation ID#1005

ISO/IEC 17024 Personnel Certification Program

Certified Investment Management Analyst® (CIMA®) professionals integrate a complex body of investment knowledge, ethically contributing to prudent investment decisions by providing objective advice and guidance to individual investors and institutional investors.

CIMA is the only financial services credential in the U.S. to have met the international standard (ISO 17024) and accredited by the American National Standards Institute.

Private group classes are available through our registered education providers at a discount versus open enrollment fees. Minimum class sizes range from 20–50. Additional details and pricing quoted upon request.

Education Providers:

CHICAGO BOOTH
The University of Chicago Booth School of Business

Wharton
UNIVERSITY of PENNSYLVANIA
Aresty Institute of Executive Education

Yale SCHOOL OF MANAGEMENT
Executive Education

INVESTMENTS & WEALTH INSTITUTE™

CPWA® CERTIFIED PRIVATE WEALTH ADVISOR®

Certified Private Wealth Advisor® (CPWA®) certificants meet an advanced wealth management competency for advisors committed to serving the needs of high-net-worth clients (clients with $5 million+ net worth).

Private group classes are available at a discount. Minimum class sizes start at 30. Additional details and pricing quoted upon request.

STEPS TO CPWA® CERTIFICATION

STEP 1

Submit an application detailing a minimum of five years of experience in financial services and four year degree or other designation.

STEP 2

Complete the 6-month online education program. Students are provided with reading materials, assignments, and online quizzes during the online program.

STEP 3

Complete executive education program through:

1. The University of Chicago Booth School of Business
2. The Yale School of Management

STEP 4

Pass the comprehensive examination.

STEP 5

Sign a License Agreement, authorizing the use of the CPWA® mark.

Education Providers:

CHICAGO BOOTH — The University of Chicago Booth School of Business

Yale SCHOOL OF MANAGEMENT Executive Education

INVESTMENTS & WEALTH INSTITUTE™

In-person Class

CIMA® Certification Time Commitment

2 weeks	4 months	1 week	3 months	6–9 months
Application and background check	Self-study and pass Qualification exam	Executive Education	Study and pass Certification exam	

Online Class

CIMA® Certification Online Time Commitment

2 weeks	4 months	±2 months	3 months	6–9 months
Application and background check	Self-study and pass Qualification exam	Online Executive Education	Study and pass Certification exam	

In-person Class

CPWA® Certification Time Commitment

2 weeks	±6 months	1 week	1 month	6–9 months
Application and background check	Online Education	Executive Education	Study and pass Certification Exam	

Online Class

CPWA® Certification Online Time Commitment

2 weeks	±6 months	±2 months	1 months	6–9 months
Application and background check	Online Education	Online Executive Education	Study and pass Certification Exam	

CFP® Time Commitment

CFP educational coursework and pass CFP exam

18–24 months

Source: www.cfp.net/become-a-cfp-professional/cfp-certification-requirements/education-requirement. Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™ and federally registered CFP (with flame design) in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

CFA® Time Commitment

Take Level 1 program and pass exam	Take Level 2 program and pass exam	Take Level 3 program and pass exam	~18 months

Source: www.cfainstitute.org/programs/cfaprogram/charterholder/pages/index.aspx. Chartered Financial Analyst® are trademarks owned by CFA Institute

ChFC® Time Commitment

ChFC educational coursework and pass ChFC exam

15–24 months

Source: www.studyfinancialplanning.com/questions. ChFC, Chartered Financial Consultant, CLU, Chartered Life Underwriter, and CASL, Chartered Advisor for Senior Living, are registered marks owned by The American College.

Retirement Management Advisor℠ (RMA℠) Designation Program

The Retirement Management Advisor (RMA) is a multi-stage education program for professionals interested in building custom retirement income plans for their clients. The program provides a unique mix of academic validation and practical application through a holistic, “across the silos” approach, rather than a strictly investment-based, goals-based, or product-based approach. Focused on outcomes, not expectations, the RMA program provides advisors with practical tools, techniques, and methodologies. The result is a set of knowledge and skills that can satisfy clients’ retirement income needs while complying with the industry’s increasing regulations.

RMA is a stackable credential that lets you earn a certificate or a designation.

Students may elect to complete just the online course and receive a certificate of completion, or advance through the capstone course and the final exam to receive the RMA certification. Financial services professionals with three years relevant experience or designations (FINRA licenses, CIMA®, CPWA®, CFP®, CFA®) who adhere to the Institute’s *Code of Professional Responsibility*, and are willing to commit to the ongoing responsibility for recertification and continuing education are eligible to sit for the final exam upon approval.

Candidates may register for the following as an individual purchase or as a package of all three levels:

RMA Level One: Retirement Management Advisor Online Course

Offered online, on-demand, this course provides includes eight modules, plus an introduction and can be completed in 9-12 weeks. Candidates who successfully complete the course will receive a certificate of completion and a digital badge that can be used on web sites or online profiles. To obtain the certificate of completion, professionals must successfully complete each module and all of the quizzes.

RMA Level Two: Retirement Management Advisor Education Capstone

This two-day, in-person event is offered in an executive education format. Presented at the Investments & Wealth Institute’s Annual Conference Experience–ACE (May) and at the Retirement Management Forum (December), this Capstone provides a deep dive into the concepts, strategies and techniques learned through the online course, in an interactive format facilitated by industry experts.

RMA Level Three: Retirement Management Advisor Exam

The RMA examination can be taken after successful completion of the Retirement Advisor Online Course and the Retirement Management Advisor Education Capstone. The examination is offered through the Institute’s Online Learning Center.

CORPORATE PARTNERSHIP FOR FORMER RIIA INSTITUTIONAL MEMBERS

The Investments & Wealth Institute is launching a new Corporate Partner Program in 2018 and all prior RIIA Institutional Members are eligible to participate. Becoming an Investments & Wealth Institute Corporate Partner shows your organization's support of advanced education for the investments and wealth profession and the advisor community we represent. Corporate Partnership provides participating firms a host of rights and benefits as well as a voice within our organization. Participation is open to all types of firms, including but not limited to: asset management firms and product manufacturers, broker-dealers and other sponsor firms, advisory solutions providers, custodians, RIA firms, legal firms, technology and service vendors, research firms, and other allied to the industry.

Corporate Partnership is not available to individual advisors or investors. Platinum, Gold, Silver, and Bronze partners will automatically receive Corporate Partnership as part of their rights and benefits. Please note that Institute policy does not allow active recruiting efforts and has a strict privacy policy for its individual members.

Annual Fee: $15,000 per firm ($10,000 per year for each additional subsidiary firm)

Rights & Benefits

1. Prior RIIA Institutional Member Firms who become Investments & Wealth Institute Corporate Partners will receive charter status and a table of 8 at the Corporate Partner Gala Dinner on January 17, 2018.
2. Five (5) complimentary individual memberships (does not apply for existing individual members).
3. Five (5) print subscriptions to *Investments & Wealth Monitor* and *Investments & Wealth Research*.
4. 25 Digital subscriptions to *Investments & Wealth Monitor* and *Investments & Wealth Research*.
5. Access to research reports (Aite, Cerulli, Teams, HNW Investors, Member surveys)
6. Unlimited digital subscriptions to Investments & Wealth Insight, Legislative Intelligence, Investment Sense Blog
7. $1,000 discount off published fee to exhibit at each of the following events: Investment Advisor Forum, ACE, Wealth Advisor Forum –or– one additional attendee registration at any of these events with your paid exhibit (Not applicable to Platinum, Gold, Silver, or Bronze Partners).
8. Participation in one of two Strategic Advisory Councils. Limited to one member per firm per council.

   Strategic Investments & Wealth Advisory Council OR Strategic Retirement Advisory Council.
9. Logo, listing, and link on www.investmentsandwealth.org
10. Corporate Partner page. A link to the Corporate Partner page will be featured in various communications throughout the year.

Rights & Benefits (continued)

11. Ability to post one white paper within Corporate Partner Resources page.
12. Opportunity to propose and present on-demand webinar in our Online Learning Center. Topic and Presenter must be approved by the Institute and subject must fit within the Investments & Wealth Competency Matrix.
13. Additional discounts on Institute Educational Programs for your firms' employees.
14. Opportunity to attend Investments & Wealth Institute 2018 Awards Dinner. Limited to one member per firm. This invitation-only event is scheduled to be held May 7, 2018 in conjunction with our Annual Conference Experience, in Nashville, Tennessee. This intimate event will acknowledge the contributions of industry firms and individuals to the advancement of the investment, wealth management, and retirement bodies of knowledge.
15. Strategic Retirement Advisory Council members are eligible to receive a preferential and discounted registration fee of $795 per person, to attend signature Investments & Wealth Institute events, including the January 16-17, 2018 New York Investment Advisor Forum, May 6-9, 2018 Annual Conference Experience (ACE) Nashville, October 29-30, 2018 Private Wealth Forum in Scottsdale, and the December 2018 Retirement Advisor Forum (location TBD).

STRATEGIC RETIREMENT ADVISORY COUNCIL

The Strategic Retirement Advisory Council will act as an advisory work group, proving guidance and direction to staff and the Institute's board on retirement industry trends, opportunities, and threats. The Council will also oversee sub-committees charged with the delivery of various initiatives including: RMA curriculum, Retirement Management Forum program development, Retirement Management Journal editorial review, and exam and standards development.

Inaugural STRATRAC Meeting

The first meeting of the Strategic Retirement Advisory Council is scheduled for Wednesday January 17, 2018 from 2:00 – 4:00 pm at the Marriott Marquis, New York City. Strategic Retirement Advisory Council members may also be interested in attending the Investments & Wealth Institute's Investment Advisor Forum scheduled to be held January 16-17, 2018 at the Marriott Marquis, New York City. Council members will receive the preferential registration fee of $795 per person.

The chairperson of the Investments & Wealth Institute Board appoints a Council chair and board liaison to serve a two-year term. No less than seven Council members are selected from corporate partners, RMA designees, and retirement industry experts to serve one-year, renewable terms.

ASSESSMENT-BASED CERTIFICATE PROGRAMS

Program sponsorships offering group discounts are available for firm employees or as value-added educational benefits to existing or prospective clients. Private group programs are available.

APPLIED BEHAVIORAL FINANCE CERTIFICATE (ONLINE)—Designed to address how advisors can help investors avoid being tripped up by their behavior when making common financial decisions. With 20 hours of CE, content is delivered by leading behavioral finance experts including: Meir Statman, Dan Ariely, Andrew Lo, Toby Moskowitz, and Courtney Pullen.	**REGISTRATION FEE:** $695 | Institute Member $895 | Nonmember Join & Learn Group rates starting at 10 registrations. Private groups starting at 25 registrations.
ESSENTIALS OF INVESTMENT CONSULTING CERTIFICATE (ONLINE)—Essentials of Investment Consulting is an online, self-study course of 10 modules and provides fundamental knowledge on core topics related to the investment consulting process.	**REGISTRATION FEE:** $545 | Institute Member $745 | Nonmember Group rates starting at 10 registrations. Private groups starting at 25 registrations.
WEALTH MANAGEMENT STRATEGIES CERTIFICATE PROGRAM (ONLINE)—Created specifically for wealth managers who work with high-net-worth clients, the program is designed to help advisors develop specific strategies to minimize taxes, monetize and protect assets, maximize growth, and transfer wealth. This 6-month online course consists of 11 modules including: Applied Behavioral Finance, Family Dynamics, Tax Strategies and Planning, Portfolio Management, Risk Management and Asset Protection, Working with Executives and Closely Held Business Owners, Charitable Giving, and Estate Planning and Wealth Transfer.	**REGISTRATION FEE:** $995 | Participant Minimum of 30 private cohort participants. *Currently only available to corporate groups.*

ASSESSMENT-BASED CERTIFICATE PROGRAMS (CONTINUED)

FUNDAMENTALS OF ALTERNATIVE INVESTMENTS CERTIFICATE (ONLINE)—The Fundamentals of Alternative Investments is an online, self-study course that provides a foundation of core concepts in alternative investments and is offered in collaboration with CAIA.	**REGISTRATION FEE:** $795 | Institute Member $895 | Nonmember Group rates starting with a minimum of 50 registrations ($695 each).
THE FUNDAMENTALS OF EXCHANGE-LISTED OPTIONS COURSE—The Fundamentals of Exchange-listed Options course examines the investment characteristics of equity and index options, and how advisors can use them to strategically manage portfolio risk, enhance returns, and gain unique market exposure.	**REGISTRATION FEE:** $595 | Institute Member $795 | Nonmember Group rates starting at 10 registrations. Private groups starting at 25 registrations.
FIDUCIARY BEST PRACTICES (ONLINE)—This six-module course provides an overview of the DOL Fiduciary Rule, Prohibited Transactions Exemption, Best Interest Contract and related exemption of proprietary products, Level Fee Exemption and Rollover Advice, Grandfather and other rule exemptions, and harmonizing the rule with other market conduct standards. A variety of expert opinions provides the opportunity to test and apply your understanding of the rule as it applies to you, your work with clients, and your specific circumstances.	**REGISTRATION FEE:** $295 Institute Member $495 Nonmember Group rates starting at 10 registrations. Private groups starting at 25 registrations.

WEB SEMINARS

	PER WEB SEMINAR	MULTI-PART SERIES
	$15,000	$55,000

Sponsorship is available for individual web seminars and web seminar series. The Institute selects the topics and speakers and hosts the event(s) on our platform. Sessions may be live, pre-recorded, or a combination of both. The Institute will manage continuing education (CE) credit approval and delivery, with each session typically approved for one hour of CE for CIMA®, CPWA® and CFP® certifications. Sponsored web seminars will be free for Institute members and offered at a nominal fee for nonmembers. Sponsors may be provided a unique promotion code so that they may invite a select group of individuals to register with no fee. On average, each Institute web seminar has more than 400 registrants between the live and archived events (Note: CFP CE credit is not available for archives). A selection of topics is available, including but not limited to: fiduciary/DOL, alternative investments, managing portfolio risk, behavioral finance, fintech, impact investing, and advanced tax strategies. Other topics may be suggested, but the Institute must approve all topics and speakers (Speakers may not be employees of the sponsoring firm).

BENEFITS:	
Exclusive sponsor recognition in e-mail pre-promotion campaign of event (or series).	●
Unique promotion code provided to sponsor to provide free access to event for customers and prospects.	●
HTML promotion created by the Institute will be provided to sponsor to send to their proprietary lists (or Institute can deliver to supplied lists).	●
Sponsor logo recognition on related pages on investmentsandwealth.org.	●
Sponsor welcome and logo recognition at the beginning and conclusion of the web seminar.	●
Sponsor recognition for archived events (archives available for 3–6 months).	●
One-time use of the live event attendee list provided upon conclusion of the series. Mailer must be pre-approved, no e-mail addresses are provided.	●

WEB SEMINARS (CONTINUED)

POTENTIAL TOPICS	WEB SEMINARS
Practical Portfolio Construction with ETFs	3 SEMINARS PER TOPIC
Basics of Portfolio Hedging	
Global Macroeconomic Outlook	
Delivering Wealth Management to Families	
Beyond Behavioral Finance: Procedural Prudence	
The Art of Discovery: Conversations about Wealth with Clients	
ALTERNATIVE INVESTMENTS WEB SERIES	**WEB SEMINARS**
The Universe of Alternative Investments	3 SEMINARS PER TOPIC
The Role of Structured Products in a Portfolio	
The Private Equity Landscape	
Adding Liquid Alternatives to Portfolios in Practice	

ANNUAL ENGAGEMENT PROGRAM

CONTENT • BRANDING • EXPOSURE

Getting your message through to busy professionals is becoming more and more complex. Today's astute marketers understand the value of delivering quality content and the need to create multiple points of engagement. Which is why we've created a comprehensive content, branding, and exposure program that consists of live events, online education, and research. By taking a comprehensive, year-long approach, you can build your reputation among our elite audience of investments and wealth professionals, aligning your brand with topical and relevant content. Below is a sample program with three key components (topics to be mutually agreed upon).

1. Exclusive Sponsorship of a one-day, in-person "Focus-on" event.
2. Exclusive Sponsorship of a Focus Online event.
3. Exclusive Sponsorship of an issue of *Investments & Wealth Research.*

This is a unique way to align your brand contextually with desired content and build thought-leadership. Significant branding will be realized throughout the life of the program through pre- and post- promotion of the three key components.

Content Branding Exposure Program Sponsorship: $100,000 to $150,000.

THANK YOU TO OUR 2017 PARTNERS & SPONSORS

INSTITUTE 2017 PLATINUM PARTNERS

Amundi Pioneer Asset Management · Nationwide is on your side · Russell Investments · TD Ameritrade Institutional

INSTITUTE 2017 GOLD PARTNERS

Raymond James — Independent | Hybrid | RIA · Wells Fargo Advisors Financial Network

INSTITUTE 2017 SILVER PARTNERS

Fidelity Investments · Nasdaq · Smead Capital Management

INSTITUTE 2017 BRONZE PARTNERS

ArrowFunds Targeting Portfolio Solutions · Charles Schwab Own your tomorrow · Deutsche Asset Management · Diamond Hill Capital Management · FlexShares · IndexIQ by MainStay Investments · Matthews Asia · Nuveen · PowerShares by Invesco · Select Sector SPDRs · Thornburg Investment Management · William Blair

INSTITUTE 2017 CONFERENCE SPONSORS

Brighthouse Financial Established by MetLife · PowerShares by Invesco · Select Sector SPDRs · William Blair

AND OUR EXHIBITORS

AB, Aberdeen Asset Management Advicent Solutions, Advisor Financing, ALPS, American Funds, Angel Oak Capital Advisors, Ave Maria Mutual Funds, BMO Nesbitt Burns, CAIA Association, Capstone Commonwealth Financial Network, Delaware Funds by Macquarie, Eaton Vance, Eaton Vance/Richard Bernstein Advisors, FactSet, Fi360, Inc., Financial Advisor/Private Weatlh Magazine, Financial Media Group, Financial Planning, FolioDynamix, Foundation Source, FP Transitions, Franklin Templeton Investment Corp, Freedom Management Group Fuller & Thaler Asset Management, Global X, Goldman Sachs Asset Management, GuideStone Funds, Hancock Horizon Funds, HiddenLevers, HighTower, Institutional Real Estate, Inc. (IREI), Investment Executive, InvestmentNews, Janus Capital Group, Jensen Investment Management, John Hancock Investments, Kaplan, Litman Gregory Asset Management, MoneyGuidePro, National Bank Investments, Natixis, NuShares from Nuveen, Oberweis Asset Management, Olive & Cocoa, OppenheimerFunds, Orion Advisor Services, O'Shaughnessy Asset Management, ProShares I ProFunds, Reinhart Partners Inc., S&P Dow Jones Indices, Sage, SKY Marketing Consultants, SpiderRock Advisors, Sprott Asset Management, TCW, The University of Chicago, Booth School of Business, Thomas White International, Thrivent Mutual Funds, Touchstone Investments, USCF, Vanguard, Vanguard Investment Canada, Vontobel Securities, WealthManagement.com, Wiley, Worth Magazine

APPENDIX: 2018 PARTNER & SPONSOR BONUS OPPORTUNITIES

Available only to Partners (Platinum, Gold, Silver) and Annual Conference Experience (ACE) Sponsors, who may select one item per ACE and specialty conferences. Bonus opportunities are not available to bronze partners or exhibitors.

AVAILABLE AT ALL CONFERENCES (EXCEPT FOR FOCUS SERIES EVENTS)

LUNCH (1–2 OPTIONS PER CONFERENCE—LUNCHEON SESSIONS TO BE SPONSORED WILL BE DETERMINED BY THE INSTITUTE AND DO NOT INCLUDE SPEAKER INTRODUCTIONS

- Company logo at each luncheon table (if tables are used)
- Sponsor signage placed near luncheon room with company's name and logo
- Recognition in onsite conference materials
- Recognition in conference app

EVENING RECEPTION (1–3 OPTIONS PER CONFERENCE)

- Custom tumblers and napkins with company logo
- Recognition on signage and in onsite conference materials
- Recognition on drink tickets given to all attendees
- Recognition in conference app

CONFERENCE LANYARDS OR BADGE HOLDERS (1 OPTION PER CONFERENCE)

- Custom lanyards or badge holders created with company logo and Institute logo
- Recognition in onsite conference materials

BREAKFAST (2–3 OPTIONS PER CONFERENCE)

- Coffee sleeves and napkins with company logo
- Recognition on signage and in onsite conference materials
- Recognition in conference app

PREMIER REFRESHMENT BREAK (1–4 OPTIONS PER CONFERENCE)

- Deluxe refreshment break with premier snack option for attendees
- Recognition on signage and in onsite conference materials
- Recognition in conference app
- Napkins with company logo

AVAILABLE AT SOME EVENTS (DEPENDENT ON LOCATION; NOT AVAILABLE AT FOCUS SERIES EVENTS)

COAT CHECK SPONSORSHIP: (1 OPTION PER CONFERENCE)

- Signage at coat check station
- Logo in onsite materials
- Recognition and alert in conference app
- Recognition in onsite conference materials

HOTEL KEY CARDS OR KEY HOLDER (1 OPTION PER CONFERENCE)

- Custom hotel room key or key holder created with company logo and Institute logo
- Recognition in onsite conference materials

LUGGAGE/BAG CHECK SPONSORSHIP (1 OPTION PER CONFERENCE)

- Signage at the luggage/bag check area with logo and firm name
- Recognition in onsite conference materials

AVAILABLE AT THE ANNUAL CONFERENCE EXPERIENCE—ACE ONLY

WATER STATION SPONSOR (1 SPONSOR ONLY)

- Branding of water stations with company logo and firm name
- Cups with company logo at water stations
- Recognition on signage and in onsite conference materials
- Recognition in conference app

CONTINUOUS COFFEE STATIONS (1 SPONSOR ONLY)

- Coffee sleeves and napkins with company logo at a coffee station open all day during the conference
- Recognition on signage and in onsite conference materials
- Recognition in conference app

SHOE SHINE STATION (1 SPONSOR ONLY)

- Professional shoe shiner supplied by Institute (shoe shiner may wear sponsor-provided company logo attire)
- Recognition on signage and in onsite conference materials
- Recognition in conference app

RELAXATION STATION (1 SPONSOR ONLY)

- Certified Massage Therapist and massage chair supplied by Institute (therapist may wear sponsor-provided company logo attire)
- Recognition on signage and in onsite conference materials
- Recognition in conference app

DESSERT RECEPTION (1 SPONSOR ONLY)

- Deluxe refreshment break with premier snack option for attendees
- Recognition on signage and in onsite conference materials
- Recognition in conference app

CHARGING/WORK STATION AT ACE (1 SPONSOR ONLY)

- Charging station
- Signage with company's name and logo and recognition in onsite conference materials
- Company's logo on note pads, pens, and mouse pads at each workstation (sponsor provided)
- Recognition in conference app

WELLNESS SPONSOR (1 SPONSOR ONLY)

- Sponsor one wellness-related event, e.g., yoga class, fun run/walk
- Signage with company's name and logo and recognition in onsite conference materials
- Branded water bottles for attendees of these events
- Recognition in conference app

Customized sponsorship opportunities are available. Contact the Institute for approval to bring in a special guest to increase traffic to your booth or offer special food and beverages. Our team can help build a sponsorship to meet your goals. Custom options will replace your regular bonus opportunity for a given event. (May not be available for every event).