



INVESTMENTS & WEALTH INSTITUTE®

SPONSOR APPLICATION & AGREEMENT

2021 FOCUS SERIES

Please read and return all terms and conditions as outlined in the Investments & Wealth Institute Partner, Sponsor, & Exhibitor Agreement.

Company Name: _____

Company Website: _____

Contact Name: _____ Title: _____

Address: _____

City/State or Province: _____ Zip/Postal Code: _____

Phone: _____ Fax: _____ E-mail: _____

I have read and agree with all terms and conditions as outlined in the Investments & Wealth Institute Partner, Sponsor, & Exhibitor Agreement.

Signature: _____ Date: _____

We would like to participate in the following Focus Event:

- | | |
|--|--|
| Focus Online Event #1: Focus on Tax Alpha - January 27, 2021 | <input type="checkbox"/> Sponsor \$15,000 |
| Focus Online Event #2: Focus on Private Securities - May 26, 2021 | <input type="checkbox"/> Sponsor \$15,000 |
| Focus Online Event #3: Focus on ETFs - August 25, 2021 | <input type="checkbox"/> Sponsor \$15,000 |
| Focus Online Event #4: Focus on Behavioral Finance - October 1, 2021 | <input type="checkbox"/> Sponsor \$15,000 |
| Focus Online Event #5: Focus on Retirement Planning - December 1, 2021 | <input type="checkbox"/> Sponsor \$15,000 |
| Focus Online Event #6: RIA Practice Series - October/November 2021 | <input type="checkbox"/> Sponsor \$15,000 |
| | <input type="checkbox"/> Series Sponsorship (Branding-Only) \$12,000 |

Payment Amount: _____

Method of Payment:

Check (payable to **Investments & Wealth Institute** for the total amount) Check Number: _____

Please note: Your company information will appear on all event materials as appears above. The named contact above will receive all sponsorship information regarding the event. All applications must be accompanied by full payment to secure sponsorship.

Mailing address:

Investments & Wealth Institute
5619 DTC Parkway, Suite 500
Greenwood Village, CO 80111

Phone and Fax:

P: +1 303-850-3081
F: +1 303-770-1812