



## 2023 MMI ANNUAL CONFERENCE

# Sponsor and Exhibitor Opportunities

OCTOBER 11-13, 2023

AUSTIN, TX | OMNI BARTON CREEK RESORT & SPA

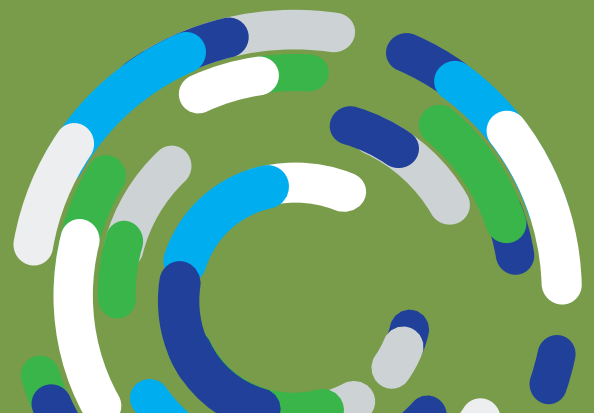


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#MMIAnnualConference 

[mminst.org](http://mminst.org)





## BE PART OF THE ENERGY AND EXCITEMENT. JOIN US IN AUSTIN!

The **2023 MMI Annual Conference**—the investment advisory industry’s most important gathering of the year—is back, in person, and in the beautiful Hill Country outside of Austin, Texas. Don’t miss this one-of-a-kind opportunity to connect with the customers and prospects you value the most in one spot over three days.

Our 2022 event drew an all-time high of 635 attendees and a record number of sponsors and exhibitors. We fully expect to top those numbers this year. Reserve your spot now to be part of the unique Annual Conference experience.

We are pleased to announce an exciting lineup of Sponsor and Exhibitor opportunities. Choose from:

- + **Premium Gold, Silver and Bronze Sponsor packages** that offer maximum branding exposure and extra benefits
- + **Exhibit Booth and Tabletop packages** that give your firm a visible presence in the bustling “Solutions Center” that is the hub of conference activity
- + **Limited Presenting Sponsor opportunities** for the Opening Reception and Night 2 Reception—both of which will create lasting memories for attendees
- + **À la carte sponsorship opportunities** including select F&B events and bespoke attendee experience items

Each package offers high-profile exposure, enhanced event participation, and new ways to engage with our audience of investment advisory business leaders and decision makers.

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## QUESTIONS?

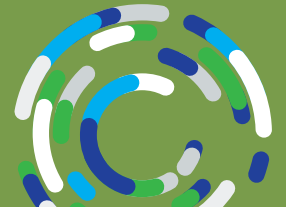
Contact Joan Lensing at (646) 868-8518 or [jlensing@mminst.org](mailto:jlensing@mminst.org)



## 2023 ANNUAL CONFERENCE AT-A-GLANCE

- + The largest investment advisory event of the year with expected attendance of more than 600 senior executives
- + A three-day event with a dynamic, high-impact experience
- + Dedicated subject matter tracks to attract a diverse audience
- + Attendees from leading asset manager, wealth manager, and solutions provider firms
- + Updated “Solutions Center” with enhanced Sponsor/ Exhibitor experience and networking
- + Planned on-demand playback access to certain sessions to extend the audience
- + Limited spots available and expected to sell out early
- + Sponsors and Exhibitors receive valuable exposure **before, during and after** the event
- + **NEW**—Presenting Sponsor opportunities available for both the Opening Reception and Night 2 Reception





# Sponsor and Exhibitor Opportunities

## CREATE HIGH-IMPACT BRAND AWARENESS AND BUILD RELATIONSHIPS

### MMI Annual Conference Sponsor and Exhibitor Opportunities

Established in 1997, the Money Management Institute (MMI) is the industry association representing financial services firms that provide financial advice and investment advisory solutions to investors. Driven by our promise of increasing connections, knowledge, and growth for our members, MMI is dedicated to fostering professional relationships, sharing experiences, and expanding the industry's influence through advocacy and education.

MMI's conferences are one of the key ways we help advisory industry stakeholders to **Connect, Know** and **Grow**. Senior executives from leading asset manager,

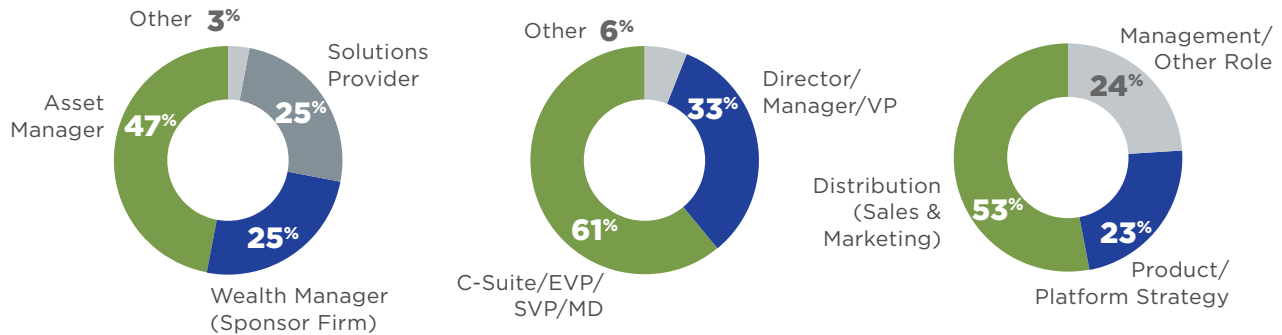
wealth manager, and solutions provider firms join us at our events to build relationships with their industry peers and gain insights on strategies and tactics to help them grow their advisory solutions business.

### Would your firm benefit from increased exposure with this audience?

MMI's 2023 Annual Conference is expected to draw over 600 senior business leaders who are responsible for developing, managing and distributing investment advisory platforms and services. Our attendees are informed decision makers who drive purchase decisions.

## TYPICAL ATTENDEES\*

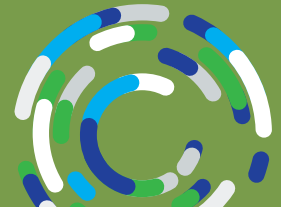
(BASED ON 2022 ANNUAL CONFERENCE)



More than **630** representatives from **over 180** distinct organizations attended the 2022 Annual Conference.\*

Among those attendees, more than **94%** held titles of VP or higher, and **76%** were distribution or product/platform leaders. We expect the profile of the 2023 Annual Conference attendees to be comparable.

\*See complete list of attending firms starting on page 13.



## MMI MEMBER FIRMS

MMI's 210+ member firms are focused on the investment advisory space. They comprise a diverse group of leading:

- + Wealth management firms and distributors
- + Asset managers
- + Wirehouses
- + Independent broker-dealers
- + Banks
- + RIA firms
- + Custodians
- + Technology and solutions provider firms
- + Industry consultants and research firms
- + Mutual fund and ETF providers
- + Alternative investment providers

## WHO SHOULD SPONSOR OR EXHIBIT

For Sponsors and Exhibitors, the Annual Conference represents an exceptional opportunity to meet with investment advisory executives, gain strategic insights, and highlight your firm's products and services. Among the broad array of firms that choose to sponsor or exhibit are:

- + Technology and service providers
- + Wealthtech and fintech companies
- + Data information/management firms
- + Emerging asset managers
- + Robo advisors/digital advice providers
- + Industry media and publications
- + Platform sponsor firms
- + Turnkey asset management firms
- + Executive search firms
- + Industry consultants and research firms
- + Third-party marketing firms
- + Other industry associations



## PREMIUM SPONSOR OPPORTUNITIES

|  | <b>GOLD</b>             | <b>SILVER</b>         | <b>BRONZE</b>                              |
|--|-------------------------|-----------------------|--|
| # Available  | 3                       | 4                     | 6  |
| <b>Pricing</b>   |                         |                       |  |
| MMI Member   | \$25,000                | \$20,000              | \$15,000                                   |
| Non-Member   | \$28,000                | \$23,000              | \$18,000                                   |
| <b>ANNUAL CONFERENCE BENEFITS</b>  |                         |                       |  |
| <b>Event Display</b>   |                         |                       |  |
| Exhibit Booth  | Single Premium Location | Single Prime Location | Choice of Single Booth or Tabletop Display |
| <b>Attendee Registrations</b>  |                         |                       |  |
| Complimentary registrations  | 4                       | 3                     | 2  |
| 15% discount on registrations above complimentary allowance  | +                       | +                     | +  |
| <b>Recognition &amp; Branding</b>  |                         |                       |  |
| Recognition as sponsor of one (1) conference track   | +                       |                       |  |
| Recognition as sponsor of one (1) networking luncheon  | +                       |                       |  |
| Recognition as sponsor of one (1) networking breakfast   |                         | +                     |  |
| Recognition as sponsor of one (1) refreshment & networking break                                   |                         |                       | +  |
| 60-second video ad in general session walk-in loop   | +                       | +                     |  |
| Digital event program—full color ad  | Full page               | Full page             | Half page                                  |
| Digital event program—sponsor page recognition   | +                       | +                     | +  |
| One (1) company-supplied handout uploaded to mobile app or giveaway distributed                    | +                       | +                     |  |
| Mobile app—banner ad   | Home page               | Interior page         | Interior page                              |
| Mobile app—listing   | Sponsor page            | Sponsor page          | Sponsor page                               |
| Mobile app—one (1) push notification to all attendees  | +                       | +                     | +  |
| Electronic list of attendees pre- and post-event (those who do not opt out of information sharing) | +                       | +                     | +  |
| Event landing page on MMI website  | Logo                    | Logo                  | Logo                                       |
| Event email communications   | Logo                    | Logo                  | Logo                                       |
| Prominent on-site signage  | Logo                    | Logo                  | Logo                                       |
| Recognition in event social media posts  | +                       | +                     | +  |
| Link to thought leadership piece or company website included in special post-event attendee email  | +                       | +                     |  |



## EXHIBITOR OPPORTUNITIES: TWO OPTIONS TO MEET YOUR NEEDS

### Two types of Exhibitor Opportunities are available.

The quantity of each is limited and will be allocated on a first-come, first-served basis.

### OPTION 1 EXHIBIT BOOTH (8' D X 10' W)

Member: \$9,500  
Non-Member: \$12,500

Includes:\*\*

- + Two complimentary registrations, including all sessions (Additional attendees play full registration fee)
- + One (1) 6' W x 30" H draped table **OR**  
One (1) 36" W x 30" H draped pedestal table
- + Two (2) chairs
- + One (1) 7" x 44" ID sign
- + One (1) wastebasket
- + Exhibitor service kit
- + Overnight security

### OPTION 2 TABLETOP DISPLAY (4' D X 6' W)

Member: \$7,000  
Non-Member: \$10,000

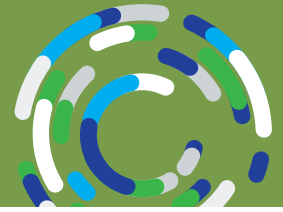
Includes:\*\*

- + One complimentary registration, including all sessions (Additional attendees play full registration fee)
- + One (1) 6' W x 30" H draped table
- + Two (2) chairs
- + One (1) 7" x 44" ID sign
- + One (1) wastebasket
- + Exhibitor service kit
- + Overnight security

### BOTH Exhibitor Opportunities also include:

- + Opening Reception and Night 2 Reception for all attendees
- + All refreshment breaks and the Night 2 Cocktail Reception held in the Solutions Center
- + Description listing in conference mobile app
- + Electronic list of attendees pre- and post-conference (those who do not opt out of information sharing)

\*\*Additional furnishing packages available through Freeman, our exhibition services provider.



# SPONSOR OPPORTUNITIES FOR THE OPENING RECEPTION

## A Night at the Oasis

Wednesday, October 11 | 6:30PM – 9:00PM  
Oasis Texas Brewing Company

Opening Reception for All Attendees

Located 450 feet above Lake Travis, the Oasis Texas Brewing Company—affectionately known as OTXBC—offers spectacular views of the Lake and the gorgeous Texas sunset. Attendees will enjoy award-winning beers, local fare, and some of the live music that makes Austin famous.

Want your firm to stand out to attendees? Be one of the Presenting Sponsors for what's sure to be a memorable event.



### PRESENTING SPONSOR

**Price: \$15,000 (non-exclusive opportunity)**

**INCLUDES:** One complimentary pass for the Annual Conference

20% discount off standard member registration fee for two additional attendees

Recognition from the conference main stage

Prominent branding opportunities at the Reception—TBD—possibilities include logo placement on step-and-repeat banner, welcome easel signs, etc.

Opportunity to provide your custom napkins and beverage coasters

Digital conference program—full-page color ad

Digital conference program—logo recognition on sponsor page

Conference mobile app—interior banner ad

Conference mobile app—listing on sponsor page

Conference mobile app—one push notification to all attendees

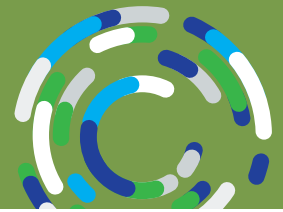
Electronic list of attendees pre- and post-conference (those who do not opt out of information sharing)

Logo recognition on event landing page on MMI website

Logo recognition on event email communications

Recognition in event social media posts





# SPONSOR OPPORTUNITIES FOR THE NIGHT 2 RECEPTION

## Hill Country Social

Thursday, October 12 | 6:30PM – 8:00PM  
Omni Barton Creek Resort & Spa

### Night 2 Reception for All Attendees

Following a cocktail reception in the conference Solutions Center, the indoor/outdoor space at the Omni Barton Creek provides a perfect setting to take in the stunning views of the Texas Hill Country. Our Night 2 Reception will provide a chance to mingle with industry colleagues in a relaxed setting while savoring authentic local cuisine and some unique Austin experiences.

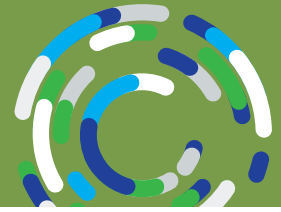
Grab the spotlight! Join us as a Presenting Sponsor for this special evening—or sponsor one of the bespoke attendee experience items that will get attendees talking!



## PRESENTING SPONSOR

**Price: \$15,000 (non-exclusive opportunity)**

- INCLUDES: One complimentary pass for the Annual Conference
- 20% discount off standard member registration fee for two additional attendees
- Recognition from the conference main stage
- Prominent branding opportunities at the Reception—TBD—possibilities include logo placement on step-and-repeat banner, welcome easel signs, etc.
- Opportunity to provide your custom napkins and beverage coasters
- Digital conference program—full-page color ad
- Digital conference program—logo recognition on sponsor page
- Conference mobile app—interior banner ad
- Conference mobile app—listing on sponsor page
- Conference mobile app—one push notification to all attendees
- Electronic list of attendees pre- and post-conference (those who do not opt out of information sharing)
- Logo recognition on event landing page on MMI website
- Logo recognition on event email communications
- Recognition in event social media posts



## ADDITIONAL SPONSOR OPPORTUNITIES FOR THE NIGHT 2 RECEPTION


**Puppy Play Lounge**
**\$15,000**

Want to create some brand buzz? Who doesn't love puppies? Your sponsorship features adorable local pups and a custom play area—and includes a donation to the Austin Animal Shelter.


**Live Graffiti Street Art**
**\$10,000**

Sponsor a local artist who will create a custom piece of mural art—and let attendees get involved in the process. This unique experience—and your brand—will leave a lasting impression.


**Golf Simulator**
**\$7,500**

Bring the fairway right to the Omni during our Night 2 Reception. In this custom set-up, conference attendees will be able to practice their swing in a simulated on-course experience. Watch the line form!

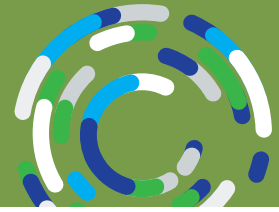

**Austin Live Music**
**\$7,500**

Music is a mainstay of the Austin scene. Sponsor one of the talented local musicians who will add entertainment and ambience to our Night 2 Reception.


**Unique Food & Beverage Stations**
**TBD**

A spicy Texas margarita? An authentic Austin taco? A local whiskey tasting? Craveable gelato? Want to make a mark and appeal to attendee taste buds at the same time? Contact us, and we'll work with you to create a custom F&B offering.

**Note: The deadline to reserve these items is September 6.**



## À LA CARTE SPONSORSHIP OPPORTUNITIES

À la Carte Sponsorship Items for the Annual Conference are available at a variety of price points to help you gain additional exposure and build extra brand awareness. Inventory is limited and available

sponsorships will be allocated on a first-come, first-served basis. Contact MMI at (646) 868-8500 or [events@mminst.org](mailto:events@mminst.org) for availability or to discuss ideas for other customized sponsorship opportunities.



### Keynote Speaker

**\$8,000**

Link your brand to one of the conference keynote sessions. Your firm will be prominently recognized—including from the main stage—as a sponsor of one of the event's most memorable sessions (non-exclusive opportunity).



### Conference Wifi

**SOLD**

Associate your brand with the wireless internet capability for all attendees. Your company will be prominently acknowledged as the Wifi sponsor throughout the conference.



### Hotel Keycards

**SOLD**

Attendees will experience your brand upon check-in and carry it throughout the conference.



### Notebook and Pen\*

**\$5,000**

Add your logo to a notebook and pen, and we will distribute them to all attendees to carry and use throughout the conference.



### Full-Page Color Ad in Digital Event Program

**\$2,500**

Place your company's ad at the fingertips of all attendees.



### Handout Uploaded to Mobile App or Giveaway Distributed to All Attendees\*

**\$2,500**

Supply a company-branded handout or giveaway to be distributed to all attendees.



### Mobile App Alert

**\$2,500**

Send a one-time alert to all conference attendees with a unique call to action.



### Mobile App Interior Banner Ad

**\$2,500**

Call attention to your firm's products and services with one of the banner ads that appears in the conference mobile app.

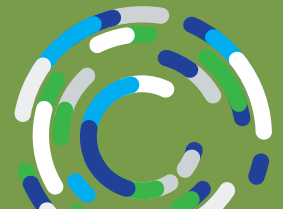


### High-Visibility Onsite Branding Opportunities

**Starting at \$5,000**

Take advantage of key onsite branding options, including customized window panels, column wraps, floor stickers, hand sanitizer stations, charging stations, restroom amenities, and more. Opportunities are available at a range of price points. Contact MMI for options and pricing.

\* Item supplied by Sponsor



# 2023 ANNUAL CONFERENCE SCHEDULE OF EVENTS

(SUBJECT TO CHANGE)

## Wednesday, October 11

|                          |   |
|--------------------------|---|
| <b>7:00AM - 10:30AM</b>  | Sponsor and Exhibitor Booth Setup   |
| <b>10:30AM - 11:00AM</b> | Solutions Center Walkthrough (Exhibit Booth or Tabletop Display must be completely set) |
| <b>11:00AM - 5:30PM</b>  | Solutions Center and Conference Registration Open                                       |
| <b>6:15PM - 7:30PM</b>   | Transportation to Opening Reception   |
| <b>6:30PM - 9:00PM</b>   | Offsite Opening Reception<br><i>A Night at the Oasis</i><br>Oasis Texas Brewing Company |

## Thursday, October 12

|                        |   |
|------------------------|---|
| <b>7:30AM - 5:30PM</b> | Solutions Center Open   |
| <b>5:30PM - 6:30PM</b> | Cocktail Reception in the Solutions Center  |
| <b>6:30PM - 8:00PM</b> | Night 2 Reception<br><i>Hill Country Social</i><br>Omni Barton Creek Resort & Spa |

## Friday, October 13

|                          |                                |
|--------------------------|--------------------------------|
| <b>7:30AM - 10:20AM</b>  | Solutions Center Open          |
| <b>10:20AM - 12:00PM</b> | Sponsor and Exhibitor Move-Out |



## PARTICIPATING FIRMS AT 2022 ANNUAL CONFERENCE

|                                |                                   |                                |
|--------------------------------|-----------------------------------|--------------------------------|
| 6sense                         | Cambridge Investment Research     | Federated Hermes               |
| AB (AllianceBernstein)         | Cantor Fitzgerald                 | Fidelity Investments           |
| Abrdn                          | CapIntel                          | First Eagle Investments        |
| ACA Compliance                 | Capital Dynamics                  | First Rate                     |
| Advisor Group                  | Capital Group                     | FLX Networks                   |
| Advisor360                     | Cerulli Associates                | Flyer Financial Technologies   |
| Advisors Asset Management      | Charles River Development         | Franklin Templeton             |
| AIG Financial Distributors     | Charles Schwab & Co.              | Fred Alger Management          |
| Allego                         | CI Global Asset Management        | Frontier Asset Management      |
| Allspring Global Investments   | Clark Capital Management Group    | FS Investments                 |
| American Century Investments   | Cohen & Steers Capital Management | FTSE Russell                   |
| Ameriprise Financial Services  | Coho Partners                     | FundFire                       |
| Amundi US                      | Columbia Threadneedle Investments | FUSE Research Network          |
| Anchor Capital Advisors        | Commonwealth Financial Network    | Glenmede                       |
| Andes Wealth Technologies      | Confluence Investment Management  | Goldman Sachs                  |
| Angel Oak                      | Congress Asset Management         | GQG Partners                   |
| Archer                         | Delaware Funds by Macquarie       | Halo Investing                 |
| Ariel Investments              | Deloitte                          | Hamilton Lane                  |
| Aristotle Capital Management   | Dimensional Fund Advisors         | Hartford Funds                 |
| Ashmore                        | Domini Impact Investments         | Heidrick & Struggles           |
| AssetMark                      | Door                              | Hello Hive                     |
| Axxes Capital                  | DWS                               | Hilton Capital Management      |
| Baillie Gifford International  | Eaton Vance                       | Horizon Investments            |
| BlackRock                      | Edelman Financial Engines         | iCapital Network               |
| Blackstone                     | Edward Jones                      | IMTC                           |
| Bluerock Capital Markets       | Envestnet                         | Insured Retirement Institute   |
| BMO Private Wealth             | Epoch Investment Partners,        | Invesco                        |
| BNY Mellon                     | EQT                               | InvestCloud                    |
| Bridge Arrow                   | F2 Strategy                       | Investments & Wealth Institute |
| BridgeFT                       | FCLT Global                       | iPipeline                      |
| Broadridge Financial Solutions |                                   | ISS Market Intelligence        |
| Calamos Investments            |                                   | Jackson                        |



## PARTICIPATING FIRMS AT 2022 ANNUAL CONFERENCE (CONT'D)

|                                     |                                   |   |
|-------------------------------------|-----------------------------------|---|
| Jacobi                              | Nikko Global Wrap                 | SEI Investments                                   |
| Jacobs & Company                    | Nomura Research Institute America | Sierra Mutual Funds & Ocean Park Asset Management |
| Janus Henderson                     | Northern Trust Asset Management   | Smartleaf Asset Management                        |
| John Hancock                        | Nuveen Investments                | SMArtX Advisory Solutions                         |
| JP Morgan                           | Orion                             | SS&C Technologies                                 |
| Kathy Freeman Company               | Pacific Life Insurance Company    | State Street Global Advisors                      |
| Lazard Asset Management             | Perpetual Investments             | Syntax  |
| LifeYield                           | PFS Investments                   | T. Rowe Price                                     |
| Lincluden Investment Management     | PGIM Investments                  | TD Asset Management                               |
| Lincoln Financial Advisors          | PIMCO                             | TD Wealth   |
| LPL Financial Services              | Polen Capital                     | Thornburg Investment Management                   |
| Madison Investment Advisors         | Principal Global Investors        | TIAA  |
| MassMutual                          | PureFacts Financial               | Todd Asset Management                             |
| Merrill Lynch                       | Putnam Investments                | TortoiseEcofin                                    |
| MFS Investment Management           | PwC                               | Touchstone Investments                            |
| Mondrian Investment Partners        | Qontigo                           | Transamerica Asset Management                     |
| Money Media                         | Ramirez Asset Management          | Truist  |
| Moody's Analytics                   | Raymond James                     | UBS   |
| Morgan Stanley Wealth Management    | RBC Wealth Management             | Vanguard  |
| Morningstar                         | RealBlocks                        | Vestmark  |
| Motive Partners                     | Refinitiv                         | Voya Investment Management                        |
| MSCI                                | RetireOne                         | WallachBeth Capital                               |
| MyVest                              | RiverFront Investment Group       | Wealthmanagement.com                              |
| Nasdaq                              | RNC Genter Capital Management     | Wellington-Altus Private Wealth                   |
| Nationwide Financial                | rpmAUM                            | Wells Fargo                                       |
| Natixis Investment Management       | Russell Investments               | William Blair & Company                           |
| Neuberger Berman                    | Salesforce                        | Wilshire  |
| New York Life Investment Management | SalesPage                         | YCharts   |
| NewRetirement                       | Salient                           |   |
|                                     | Schroders Investment Management   |   |

# 2023 MMI ANNUAL CONFERENCE Commitment Form



(646) 868-8500 [mminst.org](http://mminst.org) **in**

## SPONSOR OR EXHIBITOR INFORMATION

Contact Name \_\_\_\_\_ Company Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

## 2023 ANNUAL CONFERENCE SPONSOR/EXHIBITOR OPPORTUNITIES

### Premium Sponsor Opportunities

|        | MMI Member                        | Non-Member                        |
|--------|-----------------------------------|-----------------------------------|
| Gold   | <input type="checkbox"/> \$25,000 | <input type="checkbox"/> \$28,000 |
| Silver | <input type="checkbox"/> \$20,000 | <input type="checkbox"/> \$23,000 |
| Bronze | <input type="checkbox"/> \$15,000 | <input type="checkbox"/> \$18,000 |

### Exhibitor Opportunities

|                     |                                  |                                   |
|---------------------|----------------------------------|-----------------------------------|
| Option 1 (Booth)    | <input type="checkbox"/> \$9,500 | <input type="checkbox"/> \$12,500 |
| Option 2 (Tabletop) | <input type="checkbox"/> \$7,000 | <input type="checkbox"/> \$10,000 |

### Opening Reception Sponsor Opportunities

|                    |                                   |
|--------------------|-----------------------------------|
| Presenting Sponsor | <input type="checkbox"/> \$15,000 |
|--------------------|-----------------------------------|

### Night 2 Reception Sponsor Opportunities

|                                |                                   |
|--------------------------------|-----------------------------------|
| Presenting Sponsor             | <input type="checkbox"/> \$15,000 |
| Puppy Play Lounge              | <input type="checkbox"/> \$15,000 |
| Live Graffiti Street Art       | <input type="checkbox"/> \$10,000 |
| Golf Simulator                 | <input type="checkbox"/> \$7,500  |
| Austin Live Music              | <input type="checkbox"/> \$7,500  |
| Unique Food & Beverage Station | <input type="checkbox"/> _____    |

### À la Carte Sponsorship Opportunities

|  |                                  |
|--|----------------------------------|
| Keynote Speaker                                  | <input type="checkbox"/> \$8,000 |
| Notebook and Pen                                 | <input type="checkbox"/> \$5,000 |
| Full-Page Color Ad in Digital Event Program      | <input type="checkbox"/> \$2,500 |
| Handout or Giveaway Distributed to All Attendees | <input type="checkbox"/> \$2,500 |
| Mobile App Alert                                 | <input type="checkbox"/> \$2,500 |
| Mobile App Interior Banner Ad                    | <input type="checkbox"/> \$2,500 |
| Other _____                                      | <input type="checkbox"/> _____   |

## CANCELLATION POLICY

Sponsor and Exhibitor packages are considered final and binding at the time this signed Commitment Form is received and approved by MMI.

## PAYMENT

Total Amount Due  
(enter total for items selected) \$ \_\_\_\_\_

### Payment Information\*

Credit Card Number \_\_\_\_\_

CVV \_\_\_\_\_ Expiration Date \_\_\_\_\_

Name on Card *(if different from above)*  
\_\_\_\_\_

Address on Card *(if different from above)*  
\_\_\_\_\_

\*Payment by credit card is preferred. If you are not able to pay by credit card, please check the box below and MMI will send you an invoice to be paid by check (payable to Money Management Institute) or by electronic funds transfer.

Invoice Required

### Authorized Signatures

This signed commitment form is considered final and binding and can only be amended by mutual agreement of both parties in writing.

Purchasing Firm \_\_\_\_\_

Money Management Institute \_\_\_\_\_

## SEND COMMITMENT FORM VIA:

Email: [jlensing@mminst.org](mailto:jlensing@mminst.org)  
Mail: Money Management Institute  
Attention: Joan Lensing  
1410 Broadway, Suite 2601  
New York, NY 10018

Thank you for your Sponsorship!