



2024 MMI CONFERENCES & EVENTS

Sponsorship Prospectus



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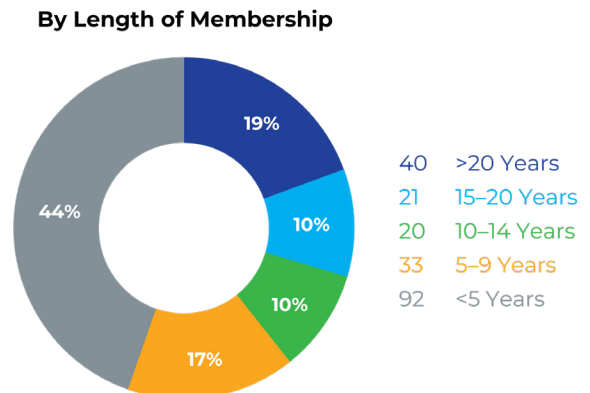
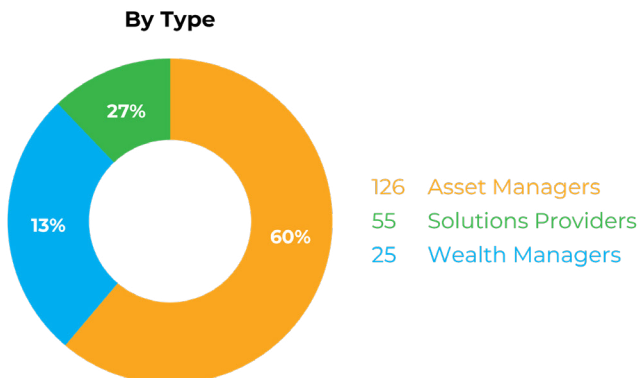
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25 Sponsorship Commitment Form

DON'T MISS OUT!

For Sponsors and Exhibitors, MMI’s conferences and events represent an exceptional opportunity to connect with senior investment advisory executives. Our diverse calendar of events offers access to a range of target audiences, all of which are engaged and ready to learn.

MMI MEMBER FIRMS



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.

Our Mission

MMI is driven by our promise of increasing connections, knowledge, and growth for our members. We are dedicated to fostering professional relationships, sharing experiences, and expanding the industry’s influence through advocacy and education.

MMI offers premier professional development programs, specialized curriculums, and facilitates peer-to-peer connections through our communities and conferences. As part of our longstanding commitment to diversity and inclusion, the Gateway Foundation provides clear pathways to entry and career advancement in the financial services industry for historically excluded and underrepresented groups.

Member Profile

200+ Member Firms

MMI’s member firms collectively represent 95% of advisory solutions industry assets and include asset managers, wealth managers, and solutions providers.

10,700+ Engaged Professionals

MMI members are the investment advisory industry leaders who are shaping the future of investment advice – representing a wide range of financial institutions and spanning the diverse functional roles critical to the advisory ecosystem.

25+ Years of Leadership

MMI has a proud legacy of empowering our members with the educational resources, engagement opportunities, and actionable insights they need to innovate and grow their advisory businesses.

MMI member firms 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

2024 MMI Events Calendar

Q1

● Annuity & Insurance Solutions Roundtable

Date TBA
Location TBA • New York, NY

● Summit

March 13–14, 2024
JW Marriott Miami Turnberry • Aventura, FL

Q2

● Academy

April 29–May 3, 2024
NYU Stern School of Business • New York, NY

● Alternative Investments Forum

May 7, 2024
BlackRock Offices • New York, NY

● Leadership Pathway Seminar

June 12–14, 2024
Hilton Denver City Center • Denver, CO

● Opening Doors Impact Night

Spring 2024
Location TBA • New York, NY

Q3

● Opening Doors Golf Classic

Summer 2024
Location TBA • Likely New York tri-state area

● Women in Advisory Solutions Symposium

September 2024
Location TBA • New York, NY

Q4

● Annual Conference

October 15-17, 2024
The Sheraton / Le Meridien Charlotte Hotel Complex • Charlotte, NC

- Thematic Event
- Signature Event
- Professional Development Event
- Opening Doors Event

MMI Annuity & Insurance Solutions Roundtable

Date

Q1 2024

Location

TBA • New York, NY

Expected Attendance

75–100

A half-day event that brings together senior leaders from the insurance and wealth management industries to explore the intersection of wealth management products and insurance strategies. Connect with the innovators bridging the gap between insurance and wealth management solutions to offer a differentiated level of service and better outcomes for high-net-worth individuals.

SPONSORSHIP OPPORTUNITIES

Sponsorship	SUPPORTING
Cost	\$5,000* / \$8,000†
Availability	3 available
Event display‡	Literature display on shared table in foyer
Complimentary registration	1
Discounted registrations	10% off standard registration fee for registrations above complimentary allowance
Opportunity to introduce or close one (1) conference session	✓
Sponsor recognition and color logo featured on event signage and general session slides	✓
One (1) company-supplied handout or giveaway distributed	✓
Electronic list of attendees pre- and post-event§	✓
Event landing page on MMI website	Logo
Event email communications	Logo
Recognition in event-related LinkedIn posts	✓
Link to thought leadership piece or company website included in special post-event attendee email	✓

*MMI member price

†Non-member price

‡If space is available

§Those who do not opt out of information sharing

2024 MMI Summit

Date

March 13–14, 2024

Location

**JW Marriott Miami Turnberry
Aventura, FL**

Expected Attendance

300–325 (MMI members only)

MMI's marquee annual leadership conference built for senior-level executives and limited to MMI member firms. As a rule, attendees are C-suite level, EVPs, SVPs, Managing Directors, Directors, and business unit leaders with responsibility for investment advisory distribution, product, platform, technology, and strategy. The Summit is a unique 'closed doors' opportunity to spend time with the brightest minds and most innovative leaders in the advisory space.

SPONSORSHIP OPPORTUNITIES (PAGE 1 OF 2)

Sponsorship	GOLD	SILVER	BRONZE	KEYNOTE SPEAKER	WIFI	BRANDED KEY CARDS
Cost	\$17,500* \$20,500†	\$13,750* \$16,750†	\$10,000* \$13,000†	\$9,000* \$12,000†	\$9,000* \$12,000†	\$9,000* \$12,000†
Availability	2 available	3 available	4 available	2 available	1 available	SOLD
Event display	Prime tabletop space in foyer	Tabletop space in foyer	Literature display on shared table in foyer	Literature display on shared table in foyer	Literature display on shared table in foyer	Literature display on shared table in foyer
Complimentary registrations	2	1	1			
Discounted registrations				25% off standard registration fee for one (1) registration	25% off standard registration fee for one (1) registration	25% off standard registration fee for one (1) registration
Lead sponsor of a Summit breakout or small group session	✓					
Lead sponsor of a Summit breakfast		✓				
Lead sponsor of a Summit networking break			✓			
Opportunity to open or close a keynote speaker				✓		
Exclusive sponsor of conference Wifi					✓	
Exclusive opportunity to brand guest hotel key cards						✓

*MMI member price

†Non-member price

Sponsorship	GOLD	SILVER	BRONZE	KEYNOTE SPEAKER	WIFI	BRANDED KEY CARDS
60-second video ad in general session walk-in loop	✓	✓				
Sponsor recognition and color logo featured in digital program book, event signage, and general session slides	✓	✓	✓	✓	✓	✓
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 event app or giveaway distributed	✓	✓	✓	✓	✓	✓
Event app—banner ad	Home page	Home page	Interior page			
Event app—listing	Sponsor page	Sponsor page	Sponsor page	Sponsor page	Sponsor page	Sponsor page
Event app—one (1) push notification to all attendees	✓	✓	✓			
Electronic list of attendees pre- and post-event*	✓	✓	✓	✓	✓	✓
Event landing page on MMI website	Logo	Logo	Logo	Logo	Logo	Logo
Event email communications	Logo	Logo	Logo	Logo	Logo	Logo
Recognition in event related LinkedIn posts	✓	✓	✓	✓	✓	✓
Opportunity to provide a content link for an upcoming issue of <i>MMInsight</i>	✓					
Link to thought leadership piece or company website included in special post-event attendee email	✓	✓				

ADDITIONAL SPONSORSHIP OPPORTUNITIES

Sponsorship	EVENING RECEPTION
Cost	\$15,000* / \$18,000†
Availability	Multiple available
Complimentary registrations	1
Discounted registrations	10% off standard registration fee for two (2) registrations
Recognition	Recognition from the conference main stage
Reception branding	Prominent branding opportunities at the reception, including providing your custom napkins or coasters
Sponsor recognition and color logo featured in digital program book, event signage, and general session slides	✓
Digital event program—full color ad	Full page
Digital event program—sponsor page recognition	✓
Event app—banner ad	Interior page
Event app—listing	Sponsor page
Event app—one (1) push notification to all attendees	✓
Electronic list of attendees pre- and post-event‡	✓
Event landing page on MMI website	Logo
Event email communications	Logo
Recognition in event-related LinkedIn posts	✓



MMI Academy

<p><i>Date</i> April 29–May 3, 2024 (Week 2–In-residence)</p> <p><i>Location</i> NYU Stern School of Business New York, NY</p> <p><i>Expected Attendance</i> 50–75 (MMI members only)</p>	<p>Academy is MMI’s career development program for early-career investment professionals with less than 5 years of experience. This 3-week program – delivered in collaboration with NYU Stern Executive Education – offers exposure to the latest management and leadership theory and applications as well as the varied roles, functions, and institutions of the financial services ecosystem. Take center stage during the second week of the program, which takes place in-person at NYU, and position your firm with some of the financial services industry’s most promising young talent.</p>
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SPONSORSHIP OPPORTUNITIES

Sponsorship	PRESENTING
Cost	\$7,500
Availability	1 available (MMI members only)
Event display*	Tabletop space in learning center
Complimentary registrations for week 2 in-residence program	2
Display branded content throughout the in-residence week at NYU	✓
Recognition as sponsor of networking dinner for all attendees on Night 2 (May 1, 2024)	✓
Firm participant in Professional Panel with Professor Holger Mueller of NYU (based on planning committee approval)	✓
Introduce or close one (1) Academy session (based on availability)	✓
Sponsor recognition and color logo featured on event signage, general session slides, and during Night 2 networking dinner (May 1, 2024)	✓
Electronic list of attendees pre- and post-event†	✓
Event landing page on MMI website	Logo
Event email communications	Logo
Recognition in event-related LinkedIn posts	✓
Link to thought leadership piece or company website included in special post-event attendee email	✓

*If space is available

†Those who do not opt out of information sharing

2024 MMI Alternative Investments Forum

Date
May 7, 2024

Location
BlackRock Offices • New York, NY

Expected Attendance
150

A fast-paced, one-day program that brings together stakeholders from across the alternative investments ecosystem to unpack the current landscape, examine emerging product and distribution trends, and discuss what advisors and clients are looking for in today’s market and economic environment. Showcase your industry leadership and build relationships with senior executives from key firms in the alternative investments space.

SPONSORSHIP OPPORTUNITIES (PAGE 1 OF 2)

Sponsorship	CHAMPION	LEADERSHIP	SUPPORTING
Cost	\$15,000* / \$18,000†	\$8,000* / \$11,000†	\$5,500* / \$8,500†
Availability	2 available	3 available	4 available
Event display‡	Prime tabletop space in foyer	Tabletop space in foyer	Literature display on shared table in foyer
Complimentary registrations	3	2	1
Discounted registrations	10% off standard registration fee for registrations above complimentary allowance	10% off standard registration fee for registrations above complimentary allowance	10% off standard registration fee for registrations above complimentary allowance
Opportunity to provide a speaker or moderator for one (1) conference session (based on availability and planning committee approval)	✓		
Opportunity to introduce or close one (1) conference session (based on availability)		✓	
60-second video ad in general session walk-in loop	✓		
Sponsor recognition and color logo featured in digital program book, event signage, and general session slides	✓	✓	✓
Digital event program—full color ad	Full page	Full page	Half page
Digital event program—sponsor page recognition	✓	✓	✓

*MMI member price

†Non-member price

‡If space is available

Sponsorship	CHAMPION	LEADERSHIP	SUPPORTING
One (1) company-supplied handout uploaded to event app or giveaway distributed	✓	✓	✓
Event app—banner ad	Home page	Home page	Interior page
Event app—listing	Sponsor page	Sponsor page	Sponsor page
Event app—one (1) push notification to all attendees	✓	✓	
Electronic list of attendees pre- and post-event*	✓	✓	✓
Event landing page on MMI website	Logo	Logo	Logo
Event email communications	Logo	Logo	Logo
Recognition in event-related LinkedIn posts	✓	✓	✓
Opportunity to provide a content link for an upcoming issue of <i>MMInsight</i>	✓		
Link to thought leadership piece or company website included in special post-event attendee email	✓	✓	



*Those who do not opt out of information sharing

2024 MMI Leadership Pathway Seminar

Date
June 12–14, 2024

Location
Hilton Denver City Center • Denver, CO

Expected Attendance
100–125

Leadership Pathway is MMI’s distinguished community and professional development program for emerging investment leaders with 5–10 years of experience. This exciting two-day program brings these promising young leaders together with current executives, industry veterans, and subject matter experts for candid conversations about leadership, career development, and the future of investment advice and solutions. Support the next generation of industry leadership and build valuable relationships today with this audience of future decision makers.

SPONSORSHIP OPPORTUNITIES (PAGE 1 OF 2)

Sponsorship	CHAMPION	LEADERSHIP	SUPPORTING
Cost	\$10,000* / \$13,000†	\$7,500* / \$10,500†	\$5,000* / \$8,000†
Availability	2 available	3 available	4 available
Event display‡	Prime tabletop space in foyer	Tabletop space in foyer	Literature display on shared table in foyer
Complimentary registrations	3	2	1
Discounted registrations	10% off standard registration fee for registrations above complimentary allowance	10% off standard registration fee for registrations above complimentary allowance	10% off standard registration fee for registrations above complimentary allowance
Opportunity to provide a speaker or moderator for one (1) conference session (based on availability and planning committee approval)	✓		
Opportunity to introduce or close one (1) conference session (based on availability)		✓	
60-second video ad in general session walk-in loop	✓		
Sponsor recognition and color logo featured in digital program book, event signage, and general session slides	✓	✓	✓
Digital event program—full color ad	Full page	Full page	Half page
Digital event program—sponsor page recognition	✓	✓	✓

*MMI member price

†Non-member price

‡If space is available

Sponsorship	CHAMPION	LEADERSHIP	SUPPORTING
One (1) company-supplied handout uploaded to event app or giveaway distributed	✓	✓	✓
Event app—banner ad	Home page	Home page	Interior page
Event app—listing	Sponsor page	Sponsor page	Sponsor page
Event app—one (1) push notification to all attendees	✓	✓	
Electronic list of attendees pre- and post-event*	✓	✓	✓
Event landing page on MMI website	Logo	Logo	Logo
Event email communications	Logo	Logo	Logo
Recognition in event-related LinkedIn posts	✓	✓	✓
Opportunity to provide a content link for an upcoming issue of <i>MMInsight</i>	✓		
Link to thought leadership piece or company website included in special post-event attendee email	✓	✓	



*Those who do not opt out of information sharing

2024 Opening Doors Impact Night

<p><i>Date</i> Spring 2024</p> <p><i>Location</i> TBA • New York, NY</p> <p><i>Expected Attendance</i> 200</p>	<p>A festive evening, hosted by the Gateway Foundation by Money Management Institute, to celebrate a path forward for diversity, equity, and inclusion in the financial services industry. The evening program includes a reception and live entertainment featuring performers from diverse communities, a special presentation honoring a distinguished DE&I champion, and the presentation of the Opening Doors Awards to those making strides toward a more inclusive future. Showcase your firm’s industry leadership while supporting Gateway’s efforts to effect positive change in our industry.</p>
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<p>About the Gateway Foundation</p>	<p>The Gateway Foundation is a 501(c)(3) non-profit organization established by the Money Management Institute to engage underrepresented communities in the financial services industry. The Foundation fosters increased access to financial literacy, industry awareness and job readiness, and professional development opportunities. Our initiatives help prepare, educate, and develop skills necessary for an impactful career in financial services organizations and as industry leaders.</p>
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SPONSORSHIP OPPORTUNITIES (PAGE 1 OF 2)

Sponsorship	CHAMPIONING	PROMOTING	SUPPORTING	PARTICIPATING	CONTRIBUTING
Cost	\$25,000	\$15,000	\$10,000	\$5,000	\$2,500
Availability	2 available	Limited availability	Limited availability	Limited availability	Limited availability to support the cause for those who can't attend the event
Complimentary tickets	15	10	10	5	2*
Sponsor of one (1) Executive IQ® by Money Management Institute scholarship	✓	✓			
Prime sponsor recognition and color logo featured on event signage and program slides	✓				
Sponsor recognition and color logo featured on event signage and program slides		✓	✓	✓	✓
Event email communications	Logo	Logo	Logo	Logo	Logo
Recognition in event related LinkedIn posts	✓	✓	✓	✓	✓

*Tickets for diverse talent from Gateway partners

Sponsorship	CHAMPIONING	PROMOTING	SUPPORTING	PARTICIPATING	CONTRIBUTING
Recognition as a Championing Sponsor during the program	✓				
Link to company website included in special post-event attendee email	✓	✓			
Electronic list of attendees pre- and post-event*	✓	✓	✓		



*Those who do not opt out of information sharing

2024 Opening Doors Golf Classic

Date
Summer 2024

Location
TBA • Likely New York tri-state area

Expected Attendance
100–125

Golf for a good cause! Hosted by the Gateway Foundation by Money Management Institute, the Golf Classic offers a day and evening of entertainment at an iconic golf club. As a sponsor, you will connect with colleagues from across the advisory industry in a relaxed setting and showcase your support for Gateway’s three strategic initiatives: financial literacy, industry awareness, and performance and professional development. Our sponsor packages offer high-profile branding exposure and repeated messaging of your corporate commitment to supporting diversity, equity & inclusion in the financial services industry.

About the Gateway Foundation

The Gateway Foundation is a 501(c)(3) non-profit organization established by the Money Management Institute to engage underrepresented communities in the financial services industry. The Foundation fosters increased access to financial literacy, industry awareness and job readiness, and professional development opportunities. Our initiatives help prepare, educate, and develop skills necessary for an impactful career in financial services organizations and as industry leaders.

SPONSORSHIP OPPORTUNITIES (PAGE 1 OF 2)

Sponsorship	TITLE	PROMOTING	SUPPORTING
Cost	\$50,000	\$30,000	\$12,500
Availability	2 available	3 available	Limited availability
Three (3) complimentary foursomes OR two (2) foursomes and recognition as Sponsor of one (1) scholarship for Executive IQ® by Money Management Institute (a direct \$30,000 value)	✓		
Two (2) complimentary foursomes OR one (1) foursome and recognition as Sponsor of one (1) scholarship for Executive IQ® by Money Management Institute (a direct \$30,000 value)		✓	
One (1) complimentary foursome (a direct \$10,000 value)			✓
Golf hole sponsorship(s)	3	2	1
Complimentary cocktail, dinner, and evening event tickets	12	8	4

Sponsorship	TITLE	PROMOTING	SUPPORTING
Distinguished branding and recognition throughout the grounds and event venue	✓		
Branding and recognition throughout the grounds and event venue		✓	✓
Event email communications	Logo	Logo	Logo
Recognition in event-related LinkedIn posts	✓	✓	✓
Public acknowledgment and opportunity to make remarks during the evening experience	✓		
Additional cocktail, dinner, and evening event tickets for your firm's DE&I leaders	2	2	2
Electronic list of attendees pre- and post-event*	✓	✓	✓



*Those who do not opt out of information sharing

2024 MMI Women in Advisory Solutions Symposium

Date
September 2024

Location
TBA • New York, NY

Expected Attendance
150–200

An exciting two-day program designed to Inspire, Empower and Support women in the investment advisory space by sharing real-world information, experiences, and ideas to foster growth and success – both professionally and personally. Get in on the ground floor and attach your firm’s brand to what promises to become one of MMI’s marquee events. Sponsor this inaugural event to promote and support all the dynamic and talented women leaders at the forefront of innovation in the advisory solutions industry.

SPONSORSHIP OPPORTUNITIES (PAGE 1 OF 2)

Sponsorship	CHAMPION	LEADERSHIP	SUPPORTING
Cost	\$10,000* / \$13,000†	\$7,500* / \$10,500†	\$5,000* / \$8,000†
Availability	2 available	3 available	4 available
Event display‡	Prime tabletop space in foyer	Tabletop space in foyer	Literature display on shared table in foyer
Complimentary registrations	3	2	1
Discounted registrations	10% off standard registration fee for registrations above complimentary allowance	10% off standard registration fee for registrations above complimentary allowance	10% off standard registration fee for registrations above complimentary allowance
Opportunity to provide a speaker or moderator for one (1) conference session (based on availability and planning committee approval)	✓		
Opportunity to introduce or close one (1) conference session (based on availability)		✓	
60-second video ad in general session walk-in loop	✓		
Sponsor recognition and color logo featured in digital program book, event signage, and general session slides	✓	✓	✓
Digital event program—full color ad	Full page	Full page	Half page
Digital event program—sponsor page recognition	✓	✓	✓

*MMI member price

†Non-member price

‡If space is available

Sponsorship	CHAMPION	LEADERSHIP	SUPPORTING
One (1) company-supplied handout uploaded to event app or giveaway distributed	✓	✓	✓
Event app—banner ad	Home page	Home page	Interior page
Event app—listing	Sponsor page	Sponsor page	Sponsor page
Event app—one (1) push notification to all attendees	✓	✓	
Electronic list of attendees pre- and post-event*	✓	✓	✓
Event landing page on MMI website	Logo	Logo	Logo
Event email communications	Logo	Logo	Logo
Recognition in event-related LinkedIn posts	✓	✓	✓
Opportunity to provide a content link for an upcoming issue of <i>MMInsight</i>	✓		
Link to thought leadership piece or company website included in special post-event attendee email	✓	✓	



*Those who do not opt out of information sharing

2024 MMI Annual Conference

<p><i>Date</i> October 15–17, 2024</p> <p><i>Location</i> The Sheraton / Le Meridien Charlotte Hotel Complex • Charlotte, NC</p> <p><i>Expected Attendance</i> 575–625</p>	<p>The largest and most important gathering of the year for investment advisory professionals! This three-day event – which includes a vibrant exhibit hall as the center of conference activity – is a one-of-a kind opportunity to connect with the customers and prospects you value the most – all in one place. We expect 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. Don't miss this chance to create high-impact brand awareness and build relationships.</p>
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SPONSORSHIP OPPORTUNITIES (PAGE 1 OF 2)

Sponsorship	GOLD	SILVER	BRONZE	KEYNOTE SPEAKER	WIFI	BRANDED KEY CARDS
Cost	\$25,000* \$28,000†	\$20,000* \$23,000†	\$15,000* \$18,000†	\$9,000* \$12,000†	\$9,000* \$12,000†	\$9,000* \$12,000†
Availability	3 available	4 available	6 available	2 available	1 available	SOLD
Exhibit Booth	Single premium location	Single prime location	Choice of single booth or tabletop display			
Complimentary registrations	4	3	2			
Discounted registrations	10% off standard registration fee for registrations above complimentary allowance	10% off standard registration fee for registrations above complimentary allowance	10% off standard registration fee for registrations above complimentary allowance	25% off standard registration fee for one (1) registration	25% off standard registration fee for one (1) registration	25% off standard registration fee for one (1) registration
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			✓			
Opportunity to open or close a keynote speaker				✓		

Sponsorship	GOLD	SILVER	BRONZE	KEYNOTE SPEAKER	WIFI	BRANDED KEY CARDS
Exclusive sponsor of conference Wifi					✓	
Exclusive opportunity to brand guest hotel key cards						✓
60-second video ad in general session walk-in loop	✓	✓				
Sponsor recognition and color logo featured in digital program book, event signage, and general session slides	✓	✓	✓	✓	✓	✓
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 event app or giveaway distributed	✓	✓	✓	✓	✓	✓
Event app—banner ad	Home page	Home page	Interior page			
Event app—listing	Sponsor page	Sponsor page	Sponsor page	Sponsor page	Sponsor page	Sponsor page
Event app—one (1) push notification to all attendees	✓	✓	✓			
Electronic list of attendees pre- and post-event*	✓	✓	✓	✓	✓	✓
Event landing page on MMI website	Logo	Logo	Logo	Logo	Logo	Logo
Event email communications	Logo	Logo	Logo	Logo	Logo	Logo
Recognition in event related LinkedIn posts	✓	✓	✓	✓	✓	✓
Opportunity to provide a content link for an upcoming issue of <i>MMInsight</i>	✓					
Link to thought leadership piece or company website included in special post-event attendee email	✓	✓				

*Those who do not opt out of information sharing

EXHIBIT BOOTH OPPORTUNITIES

Booth Size	EXHIBIT BOOTH (8'×10')	EXHIBIT TABLETOP (6'×30")
Cost	\$10,000* / \$13,000†	\$7,000* / \$10,000†
Availability	Multiple available	Multiple available
Complimentary registrations	2	2
Discounted registrations	8'×10' booth space with choice of: One (1) draped exhibit table with two (2) chairs or one (1) pedestal table with two (2) chairs	6'×30" tabletop space with one (1) draped exhibit table and two (2) chairs
ID Sign	✓	✓
Overnight security	✓	✓
Wastebasket	✓	✓
Event app—listing	✓	✓
Electronic list of attendees pre- and post-conference‡	✓	✓

ADDITIONAL SPONSORSHIP OPPORTUNITIES (PAGE 1 OF 2)

Sponsorship	OPENING RECEPTION	NIGHT 2 RECEPTION
Cost	\$20,000* / \$23,000†	\$20,000* / \$23,000†
Availability	Multiple available	Multiple available
Complimentary registrations	1	1
Discounted registrations	10% off standard registration fee for two (2) registrations	10% off standard registration fee for two (2) registrations
Recognition	Recognition from the conference main stage	Recognition from the conference main stage
Reception branding	Prominent branding opportunities at the reception, including providing your custom napkins or coasters	Prominent branding opportunities at the reception, including providing your custom napkins or coasters
Sponsor recognition and color logo featured in digital program book, event signage, and general session slides	✓	✓

Sponsorship	OPENING RECEPTION	NIGHT 2 RECEPTION
Digital event program—full color ad	Full page	Full page
Digital event program—sponsor page recognition	✓	✓
Event app—banner ad	Interior page	Interior page
Event app—listing	Sponsor page	Sponsor page
Event app—one (1) push notification to all attendees	✓	✓
Electronic list of attendees pre- and post-event*	✓	✓
Event landing page on MMI website	Logo	Logo
Event email communications	Logo	Logo
Recognition in event-related LinkedIn posts	✓	✓



*Those who do not opt out of information sharing

Want to learn more?

Interested in connecting with MMI's audience of influential investment advisory executives representing leading asset managers, wealth managers, and solutions providers?

Our diverse menu of sponsorship packages is designed to help you build brand awareness, showcase your products and services, and cultivate relationships with prospects and clients.

Contact us to discuss a package that meets your particular sponsorship goals.

Joan Lensing
EVP, Chief Programming Officer
jlensing@mminst.org
(646) 868-8518

For **Opening Doors Impact Night** and the **Opening Doors Golf Classic**, contact:

Gateway Foundation
gateway@mminst.org
(646) 868-8500

Previous Event Photos





Sponsorship Commitment Form

ANNUITY & INSURANCE SOLUTIONS ROUNDTABLE • THEMATIC EVENT

	MMI Member	Non-Member
SUPPORTING SPONSOR	\$5,000	\$8,000

SUMMIT • SIGNATURE EVENT

	MMI Member	Non-Member
GOLD SPONSOR	\$17,500	\$20,500
SILVER SPONSOR	\$13,750	\$16,750
BRONZE SPONSOR	\$10,000	\$13,000
KEYNOTE SPEAKER SPONSOR	\$9,000	\$12,000
WIFI SPONSOR	\$9,000	\$12,000
BRANDED KEY CARD SPONSOR	SOLD	
EVENING RECEPTION SPONSOR	\$15,000	\$18,000

ACADEMY • PROFESSIONAL DEVELOPMENT EVENT

PRESENTING SPONSOR	\$7,500	
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ALTERNATIVE INVESTMENTS FORUM • THEMATIC EVENT

	MMI Member	Non-Member
CHAMPION SPONSOR	\$15,000	\$18,000
LEADERSHIP SPONSOR	\$8,000	\$11,000
SUPPORTING SPONSOR	\$5,500	\$8,500

LEADERSHIP PATHWAY SEMINAR • PROFESSIONAL DEVELOPMENT EVENT

	MMI Member	Non-Member
CHAMPION SPONSOR	\$10,000	\$13,000
LEADERSHIP SPONSOR	\$7,500	\$10,500
SUPPORTING SPONSOR	\$5,000	\$8,000

OPENING DOORS IMPACT NIGHT • OPENING DOORS EVENT

CHAMPIONING SPONSOR	\$25,000
PROMOTING SPONSOR	\$15,000
SUPPORTING SPONSOR	\$10,000
PARTICIPATING SPONSOR	\$5,000
CONTRIBUTING SPONSOR	\$2,500

OPENING DOORS GOLF CLASSIC • OPENING DOORS EVENT

TITLE SPONSOR	\$50,000
PROMOTING SPONSOR	\$30,000
SUPPORTING SPONSOR	\$12,500

WOMEN IN ADVISORY SOLUTIONS SYMPOSIUM • THEMATIC EVENT

	MMI Member	Non-Member
CHAMPION SPONSOR	\$10,000	\$13,000
LEADERSHIP SPONSOR	\$7,500	\$10,500
SUPPORTING SPONSOR	\$5,000	\$8,000

ANNUAL CONFERENCE • SIGNATURE EVENT

	MMI Member	Non-Member
GOLD SPONSOR	\$25,000	\$28,000
SILVER SPONSOR	\$20,000	\$23,000
BRONZE SPONSOR	\$15,000	\$18,000
KEYNOTE SPEAKER SPONSOR	\$9,000	\$12,000
WIFI SPONSOR	\$9,000	\$12,000
BRANDED KEY CARD SPONSOR	SOLD	
EXHIBIT BOOTH (8'x10')	\$10,000	\$13,000
EXHIBIT TABLETOP (6'x30")	\$7,000	\$10,000
OPENING RECEPTION SPONSOR	\$20,000	\$23,000
NIGHT 2 RECEPTION SPONSOR	\$20,000	\$23,000

TOTAL OF ALL SELECTED \$ _____

SPONSOR OR EXHIBITOR INFORMATION

Contact Name _____

Firm Name _____

Address _____

City _____ State _____ Zip _____

Email _____ Phone _____

NOTE: PLEASE RETURN PAGES 25-28 TO SUBMIT YOUR SPONSORSHIP REQUEST

PAYMENT INFORMATION*

Credit Card # _____

CVV _____ Exp. Date _____

Name on Card _____

Billing Address _____

City _____ State _____ Zip _____

TOTAL FROM PREVIOUS PAGE

\$ _____

***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 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 _____

Date _____

Date _____

SEND COMMITMENT FORM VIA

Email
jlensing@mminst.org

Mail
 Money Management Institute
 Attn: Joan Lensing
 1410 Broadway, Suite 2601
 New York, NY 10018

CANCELLATION POLICY

MMI reserves the right to approve/decline all Sponsor and Exhibitor applications. Sponsor and Exhibitor packages are considered final and binding at the time this signed Commitment Form is received and approved by MMI. No refunds will be given for cancellations.

