

2025 MMI Annual Conference

SPONSOR AND EXHIBITOR

OPPORTUNITIES

October 15–17, 2025 • Hyatt Regency Washington on Capitol Hill • Washington, DC



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BE PART OF THE ENERGY AND EXCITEMENT. JOIN US IN WASHINGTON, DC!

The 2025 MMI Annual Conference—the investment advisory industry's most important gathering of the year—will take place in our nation's capital, Washington, DC. 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 2024 event drew over 630 attendees representing over 190 firms and a robust roster of Sponsors and Exhibitors—and we're setting the bar even higher for 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** to meet your specific needs and budget

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.

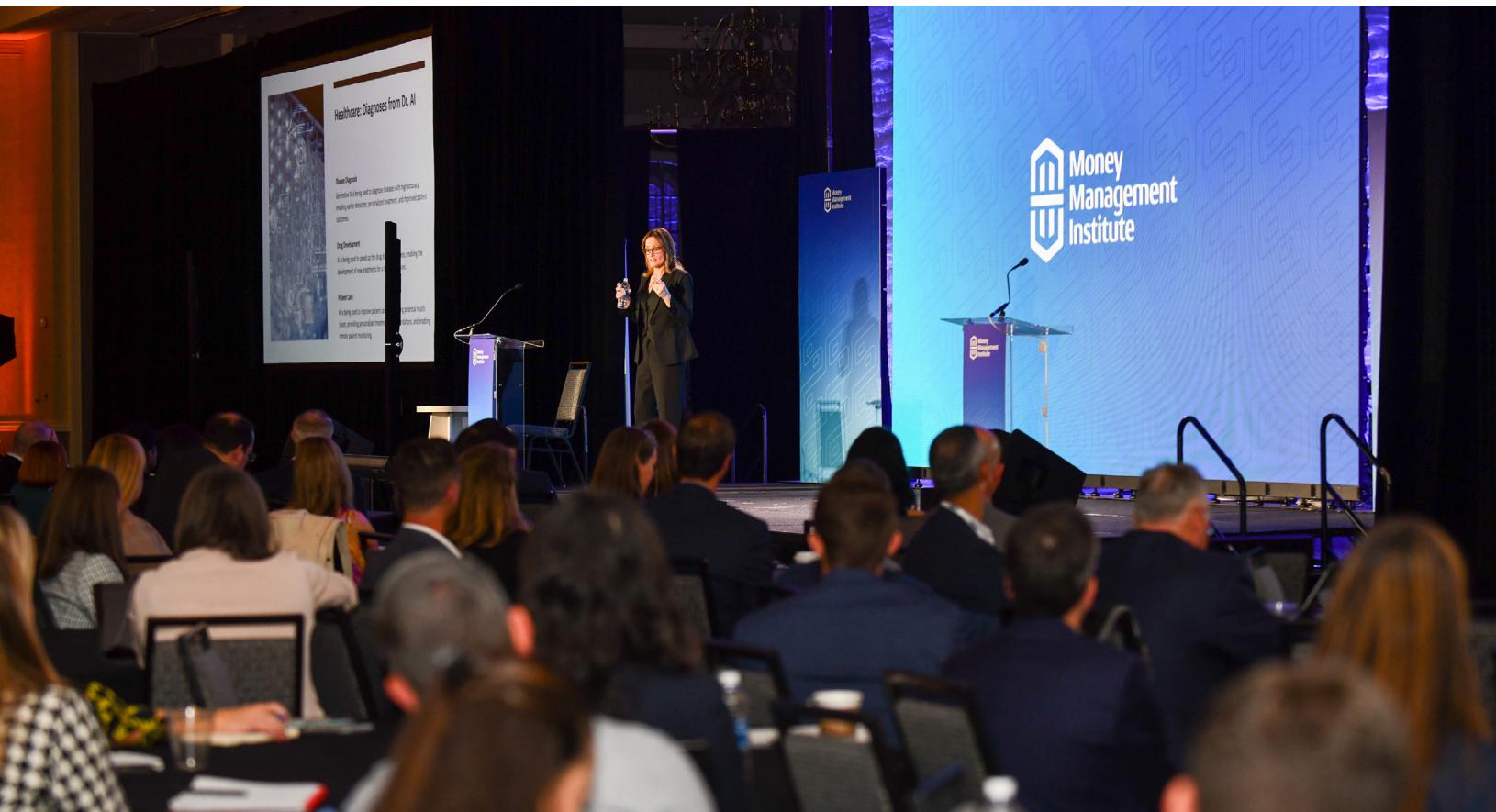


QUESTIONS?

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

2025 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 opportunities**
- + **Presenting Sponsor opportunities** available for both the **Opening Reception** and **Night 2 Reception**
- + 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



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** into strategies and tactics to help them grow their advisory solutions business.

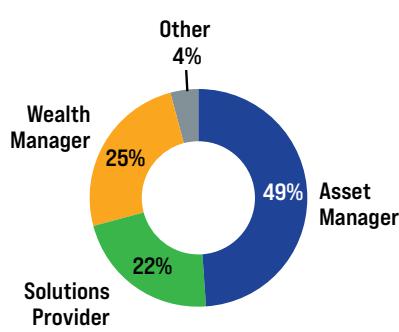
Would your firm benefit from increased exposure with this audience?

MMI's 2025 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.

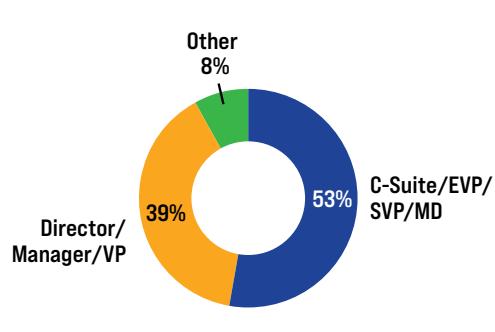
ATTENDEE PROFILE*

(Based on 2024 Annual Conference)

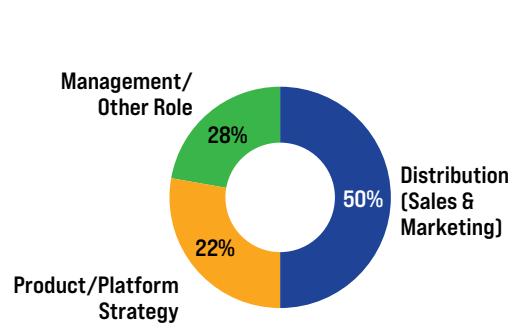
FIRM TYPE



SENIORITY



ROLE



*More than 630 representatives from over 190 distinct organizations attended the 2024 Annual Conference.

Among those attendees, more than 92% held titles of VP or higher, and 72% were distribution or product/platform leaders. We expect the profile of the 2025 Annual Conference attendees to be comparable.

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 solutions 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

(Continued on next page)

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	4	6	2	1	1
Exhibit Booth	Single booth premium location	Single booth prime location	Single booth			
Complimentary registrations	4	3	2			
Discounted registrations	10% off regular fee for additional registrations	10% off regular fee for additional registrations	10% off regular fee for additional registrations	25% off regular fee for one (1) registration	25% off regular fee for one (1) registration	25% off regular 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				●		
Exclusive sponsor of conference Wifi					●	
Exclusive sponsor of hotel key cards						●

*MMI member price

†Non-member price

PREMIUM SPONSOR OPPORTUNITIES

(Cont'd)

Sponsorship	GOLD	SILVER	BRONZE	KEYNOTE SPEAKER	WIFI	BRANDED KEY CARDS
Sponsor recognition and color logo featured on event signage and general session slides	●	●	●	●	●	●
Slide in sponsor video loop	●	●	●			
One (1) handout uploaded to event app	●	●	●	●	●	●
Event app—banner ad	●	●	●			
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	●	●	●	●	●	●
Content link in issue of <i>MMInsight</i>	●					
Thought leadership or website link in post-event email	●	●				

*Those who do not opt out of information sharing

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.

Booth Size	OPTION 1: EXHIBIT BOOTH (8'×10')	OPTION 2: EXHIBIT TABLETOP (6'×30")
Cost	\$10,000* / \$13,000†	\$7,000* / \$10,000†
Availability	Multiple	Multiple
Complimentary registrations	2	1
Booth Options	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 table and two (2) chairs
ID Sign	●	●
Overnight security	●	●
Wastebasket	●	●
Event app—listing	●	●
Electronic list of attendees pre- and post-conference‡	●	●

*MMI member price

†Non-member price

‡Those who do not opt out of information sharing

Both Exhibitor Opportunities Also Include:

- + Opening Reception for all attendees
- + All refreshment breaks and the Night 2 Cocktail Reception held in the Solutions Center
- + Description listing in conference mobile app



SPONSOR OPPORTUNITIES FOR THE OPENING RECEPTION

A 'CAPITAL' NIGHT

Wednesday, October 15 • 6:30pm – 9:00pm
Location TBD

Opening Reception for All Attendees

Each year, the Opening Reception is a highlight of the MMI Annual Conference, and this year will be no different. Set against the backdrop of Washington, DC, the evening promises to be a unique combination of local flavor and flair. Known for its lively neighborhoods and historic landmarks, DC sets the scene for a night full of the energy and fun expected from an MMI kickoff reception. The venue is still being finalized, but attendees will enjoy good company, creative local fare, and an atmosphere that captures the spirit of the nation's capital.

WANT YOUR FIRM TO STAND OUT TO ATTENDEES? BE ONE OF THE PRESENTING SPONSORS FOR WHAT'S SURE TO BE A MEMORABLE EVENT.



Sponsorship	OPENING RECEPTION
Cost	\$20,000* / \$23,000†
Availability	Multiple
Complimentary registrations	1
Discounted registrations	10% off regular fee for two (2) additional 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 event signage and general sessions slides	●
Slide in sponsor loop	●
Event app—banner ad	●
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 member price

†Non-member price

‡Those who do not opt out of information sharing

SPONSOR OPPORTUNITIES FOR THE NIGHT 2 RECEPTION

CAPITOL HILL SOCIAL

Thursday, October 16 • 5:30pm – 7:30pm
Hyatt Regency Washington on Capitol Hill

Night 2 Reception for All Attendees

The Solutions Center, our bustling exhibit hall, provides the perfect venue for attendees to mingle with industry colleagues in a relaxed setting while savoring authentic local cuisine and a unique experience in the nation's capital city.

Grab the spotlight! Join us as a Presenting Sponsor for this special evening.



Sponsorship	NIGHT 2 RECEPTION
Cost	\$20,000* / \$23,000†
Availability	Multiple
Complimentary registrations	1
Discounted registrations	10% off regular fee for two (2) additional 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 event signage and general sessions slides	●
Slide in sponsor loop	●
Event app—banner ad	●
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 member price

†Non-member price

‡Those who do not opt out of information sharing

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.



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.



Mobile App Interior Banner Ad

\$2,500

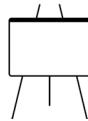
Call attention to your firm's products and services with one of the banner ads that appears in the conference mobile app.



Full Color Ad in Video Ad Compilation Reel

\$2,500

Catch the attention of attendees by placing your firm's ad in the compilation reel that plays between sessions.



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.



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.



*Item Supplied by Sponsor

Contact MMI at (646) 868-8500 or events@mminst.org for availability or to discuss ideas for other customized sponsorship opportunities.

CONNECT

KNOW

GROW

ADDITIONAL SPONSOR OPPORTUNITIES

LET YOUR IMAGINATION RUN WILD!

Want to create a custom sponsorship opportunity that spotlights your firm while providing a memorable experience for attendees?

Please contact MMI at events@mminst.org or (646) 868-8500 to discuss additional opportunities.



2025 ANNUAL CONFERENCE PRELIMINARY SCHEDULE OF EVENTS

Wednesday, October 15

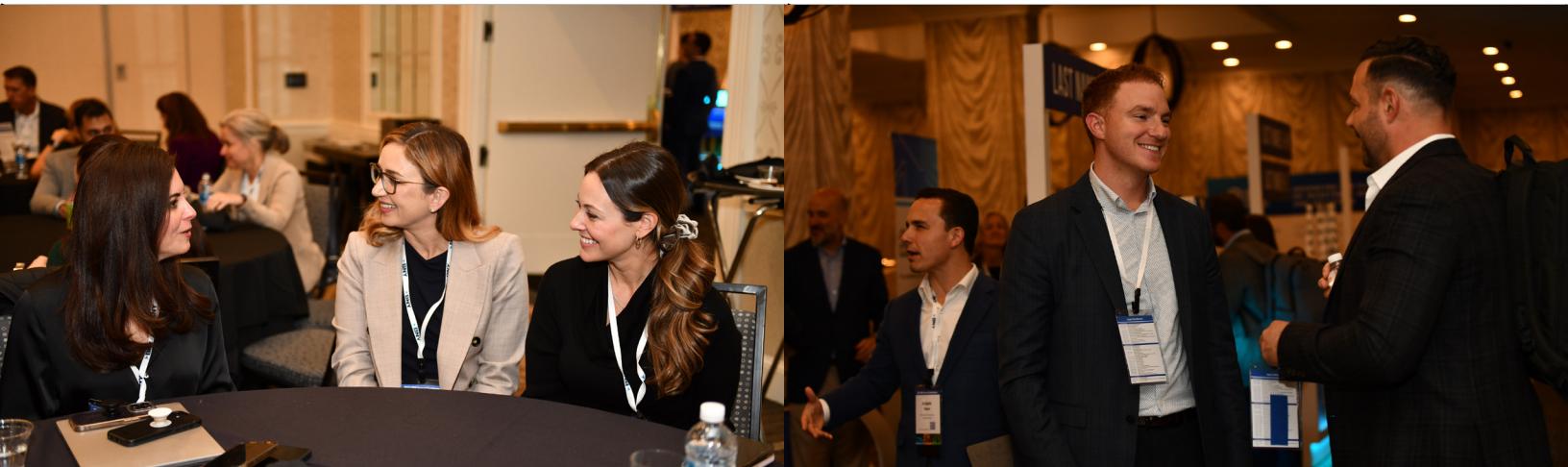
7:00AM – 10:30AM	Sponsor and Exhibitor Booth Setup
10:30AM – 11:00AM	Solutions Center Walkthrough <i>(Exhibit Booth or Tabletop Display must be completely set)</i>
11:30AM – 5:30PM	Solutions Center and Conference Registration Open
6:15PM – 7:30PM	Transportation or Walk to Opening Reception
6:30PM – 9:00PM	Offsite Opening Reception: A Capital Night <i>Location TBA</i>

Thursday, October 16

7:30AM – 5:30PM	Solutions Center Open
5:30PM – 7:30PM	Night 2 Reception <i>Capitol Hill Social</i> Hyatt Regency Washington on Capitol Hill

Friday, October 17

7:30AM – 11:00AM	Solutions Center Open
11:00AM – 1:00PM	Sponsor and Exhibitor Move-Out



PARTICIPATING FIRMS AT 2024 ANNUAL CONFERENCE

(Continued on next page)

400 Capital Management	Broadridge Financial Solutions	Eaton Vance
4U Platform LLC	Brooklyn Investment Group	Edward Jones
8 Acre Perspective	Brown Advisory	Envestnet
ACR Alpine Capital Research	BX Index	Ernst & Young
Advisors Asset Management	Calamos Investments	F/m Investments
Advyzon	Cannon Financial Institute	F2 Strategy
AllianceBernstein	Canopy Capital	Federated Hermes
Allspring Global Investments	Cantor Fitzgerald Asset Management	Fenimore Asset Management
Alpha FMC	Capital Group	Fidelity Investments
AlphaScale	Cerulli Associates	Fiera Capital
American Century Investments	CGI	Financial Services Institute
Ameriprise Financial Services	Charles River Development	First Eagle Investments
Amundi US	Charles Schwab	FLX Networks
Anchor Capital	CIM Group	Flyer Financial Technologies
Andes Risk	Clark Capital	Franklin Templeton
Apollo Global Management	CMS Associates	Frontier Asset Management
Aristotle Capital Management	Cohen & Steers	FS Investments
Ashmore	Columbia Threadneedle	FUSE Research Network
Assetlink	Confluence Investment Management	Glenmede Investment Management
AssetMark	Congress Asset Management	Global Atlantic Financial Company
Axos Bank	Corebridge Financial	Goldman Sachs
Bahl & Gaynor	CRC	Golub Capital
Baillie Gifford International	Cruz Mortensen	GQG Partners
Bank of America Merrill Lynch	Dakota	Halo Investing
Belle Haven Investments	Daphne	Hamilton Lane
BlackRock	Davidson Investment Advisors	Harbor Capital Advisors
Blackstone	DebraOhstrom.com	Harding Loevner LP
Blue Owl Capital	Deloitte	Hartford Funds
Bluerock Capital Markets	Dimensional Fund Advisors	Hillman Capital Management
BNY Archer	Domini Impact Investments	Hilton Capital Management
BNY Investment Management	Door	Horizon Investments
Bondbloxx	DWS	iCapital
Brandes Investment Partners	Eagle Capital Management	ICS

PARTICIPATING FIRMS AT 2024 ANNUAL CONFERENCE

(Cont'd)

Impax Asset Management	Nomura Research Institute America	SSI Investment Management
IMTC	North Square Investments	State Street Global Advisors
Income Discovery	Northern Trust Asset Management	StepStone Private Wealth
Insured Retirement Institute (IRI)	Nuveen Investments	Stifel, Nicolaus & Company
Invesco	Ocean Park Asset Management	T. Rowe Price
InvestCloud	Orion	TD Asset Management
Investments & Wealth Foundation	Osterweis Capital Management	Third Street Partners
ISS Market Intelligence	Pacific Life Insurance Company	Thornburg Investment Management
Jackson	Parnassus Investments	TIAA
Jacobs & Company	PFS Investments	TIFIN AMP
Janney Montgomery Scott	PGIM	Todd Asset Management
Janus Henderson	PIMCO	Toews Asset Management
John Hancock Investment Management	Polen Capital	Touchstone Investments
JP Morgan	Principal Asset Management	Transamerica
Kathy Freeman Company	Raymond James	Truist
Lazard Asset Management	RBC Global Asset Management	UBS Financial Services
Lincoln Financial Advisors	Richard Bernstein Advisors	Vanguard
Linedata	Ritholtz Wealth Management	Vestmark
Lord Abbett	Riverbridge	Voya Investment Management
LPL Financial Services	RLR Strategic Partners	WCM Investment Management
LSEG	RNC Genter	Wells Fargo
Macquarie Asset Management	Russell Investments	Westwood Holdings Group
Madison Investments	S&P Dow Jones Indices	Wilbanks & Partners
MFS Investment Management	SalesPage	William Blair & Company
Microsoft	Schroders Investment Management	Willow
Morgan Stanley Wealth Management	Seaport Global Asset Management	WisdomTree
Morningstar	Segall Bryant & Hamill	XA Investments
MSCI	SEI Investments	YCharts
MyVest	SigFig	
Natixis Investment Management	Sim Corp	
Neibart Group	SMArtX Advisory Solutions	
Neuberger Berman	SMBC Global Investment & Consulting Ltd	
New York Life Investment Management	SS&C Technologies	

SPONSORSHIP COMMITMENT FORM

Sponsor or Exhibitor Information

Contact Name _____

Firm Name _____

Address _____

City _____ State _____ Zip _____

Email _____

Phone _____

PREMIUM SPONSOR OPPORTUNITIES		
	MMI MEMBER	NON-MEMBER
GOLD SPONSOR	\$25,000	\$28,000
SILVER SPONSOR	\$20,000	\$23,000
BRONZE SPONSOR	\$15,000	\$18,000
WIFI SPONSOR	\$9,000	\$12,000
BRANDED KEY CARD SPONSOR	\$9,000	\$12,000
EXHIBITOR OPPORTUNITIES		
	MMI MEMBER	NON-MEMBER
EXHIBIT BOOTH (8'x10')	\$10,000	\$13,000
EXHIBIT TABLETOP (6'x30")	\$7,000	\$10,000
OPENING RECEPTION SPONSOR OPPORTUNITIES		
	MMI MEMBER	NON-MEMBER
PRESENTING SPONSOR	\$20,000	\$23,000
NIGHT 2 RECEPTION SPONSOR OPPORTUNITIES		
	MMI MEMBER	NON-MEMBER
PRESENTING SPONSOR	\$20,000	\$23,000
À LA CARTE SPONSOR OPPORTUNITIES		
	MMI MEMBER	NON-MEMBER
NOTEBOOK AND PEN*	\$5,000	
VIDEO AD COMPILATION REEL—FULL COLOR AD	\$2,500	
HANDOUT UPLOADED TO MOBILE APP OR GIVEAWAY DISTRIBUTED TO ALL ATTENDEES*	\$2,500	
MOBILE APP ALERT	\$2,500	
MOBILE APP INTERIOR BANNER AD	\$2,500	
HIGH-VISIBILITY ONSITE BRANDING OPPORTUNITIES	TBD	
OTHER _____	TBD	

*Item Supplied by Sponsor

TOTAL OF ALL SELECTED \$ _____

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.

THANK YOU FOR YOUR SPONSORSHIP!

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