

2026 MMI CONFERENCES AND EVENTS

SPONSORSHIP OPPORTUNITIES



PARTICIPATE WITH INTENT.

SOLVE TOGETHER.

THINK FORWARD.

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OUR MISSION

Established in 1997, the Money Management Institute (MMI) serves as the collective voice of the investment advisory solutions industry.

For more than 25 years, MMI has nurtured a vibrant, member-led ecosystem that mirrors the vast and evolving investment landscape. It's a place where wealth managers, asset managers, and solutions providers come together, not just as professionals, but as collaborators, to foster meaningful relationships and the open exchange of ideas. Through industry-leading events, professional development programs, peer networks, and advocacy initiatives, MMI empowers its members to participate with intent, solve together, and think forward. Together, they tackle the industry's toughest challenges, ensuring the community's strength and resilience will endure for years to come.

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.

THE VALUES THAT DRIVE OUR MEMBERSHIP:

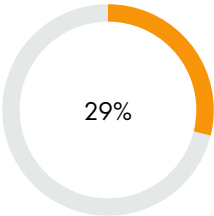
PARTICIPATE WITH INTENT.

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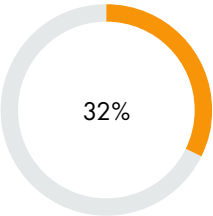
THINK FORWARD.

210 MEMBER FIRMS AS OF Q3 2025

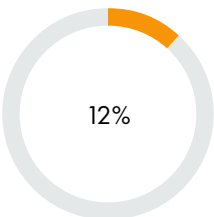
By Firm Type



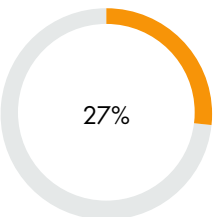
61 Asset Managers



68 Emerging Asset Managers
(AKA Thrive Members)

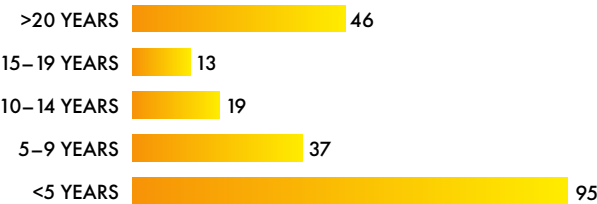


25 Wealth Managers



56 Solutions Providers

By Length of Membership



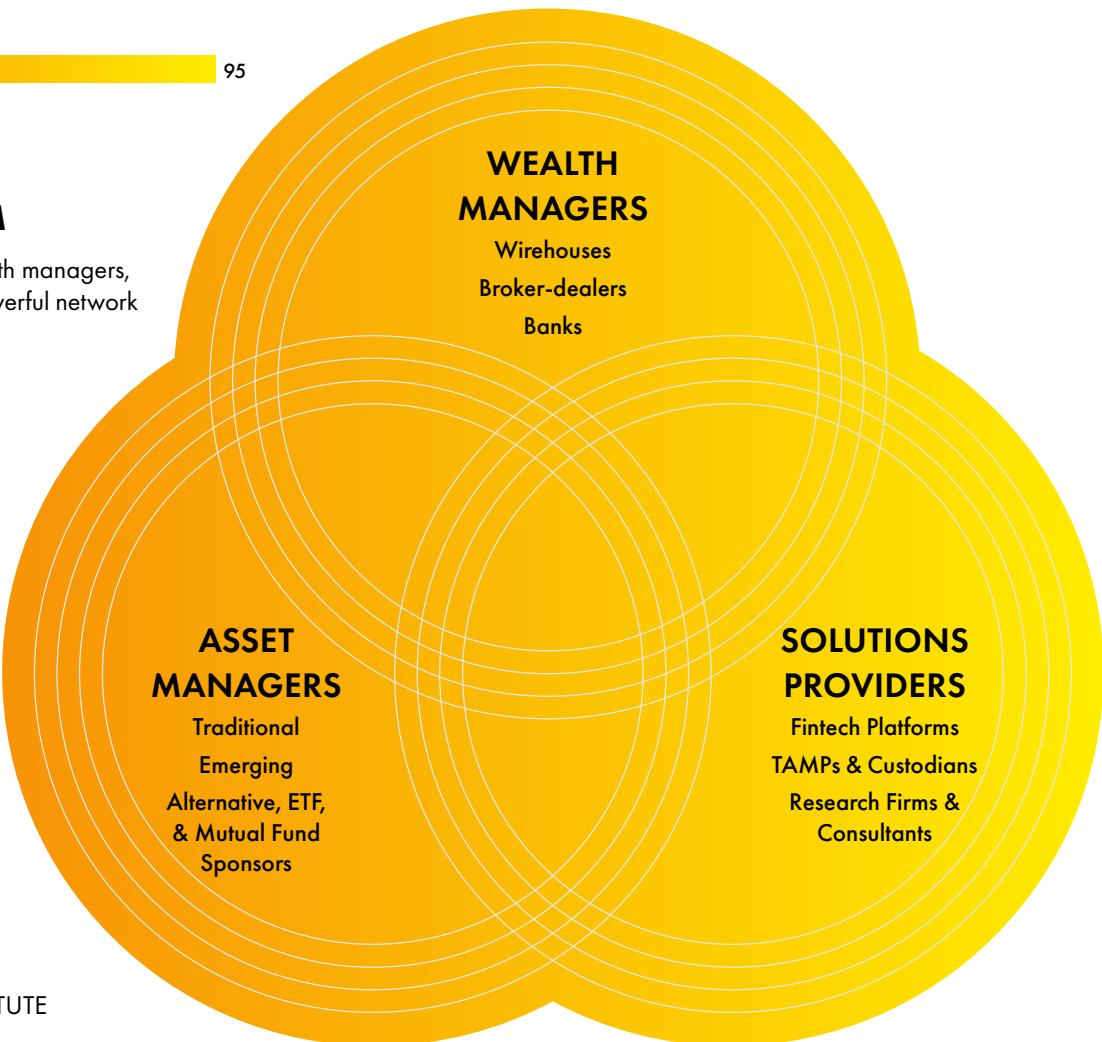
THE MMI ECOSYSTEM

Connecting asset managers, wealth managers, and solutions providers in one powerful network driving industry progress.

OUR MEMBER NETWORK

With a membership representing 95% of investment advisory solutions assets, MMI is purpose-built to connect firms, shape best practices, and drive progress in investment advice. It serves as a vital bridge where tradition meets innovation, uniting diverse voices around a common goal.

With over 200 member firms and 12,000+ engaged professionals, MMI brings together the full spectrum of the advisory solutions industry. Our membership includes established and emerging asset managers, wealth management organizations of every model, and leading solutions providers offering technology, platforms, and services. More than a third of member firms have been part of MMI for over a decade — forming a deeply rooted community rich with experience and institutional knowledge. This strong foundation, energized by a steady flow of new members bringing fresh ideas and perspectives, makes MMI the leading forum for industry connections and innovation.



2026 EVENTS CALENDAR

Professional Development Event

Signature Event

Thematic Event

Q1

Summit

March 18–20, 2026
JW Marriott Orlando, Grande Lakes
Orlando, FL

Q2

Academy

May 19–21, 2026
NYU Stern School of Business
New York, NY

Alternative Investments Forum

Spring 2026
New York, NY

Leadership Pathway Intensive

June 15–17, 2026
Duke in DC
Washington, DC

Q3

Women in Advisory Solutions Forum

Summer 2026
New York, NY

Q4

Annual Conference

October 7–9, 2026
The Westin Boston Seaport District
Boston, MA

Annuity & Insurance Solutions Forum

Fall 2026
New York, NY

National Accounts Forum

Fall 2026
New York, NY

Institutional Forum

Date/Location TBA

SUMMIT

Date
March 18–20, 2026

Location
JW Marriott Orlando,
Grande Lakes
Orlando, 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, and business unit heads 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.

Sponsorships for the Summit are limited to MMI members.

Sponsorship	Gold	Silver	Bronze	Keynote Speaker	WiFi	Branded Key Cards
Cost	\$17,500	\$13,750	\$10,000	\$9,000	\$12,000	\$9,000
Availability (MMI members only)	2	3	4	2	1	1
Event display	Prime tabletop space	Tabletop space	Literature display on shared table	Literature display on shared table	Literature display on shared table	Literature display on shared table
Complimentary registrations	2	1	1		1	
Discounted registrations				25% off one (1) full price registration		25% off one (1) full price registration
Lead sponsor of a breakout or small group session	●					
Lead sponsor of a breakfast		●				
Lead sponsor of a networking break			●			
Opportunity to open or close keynote				●		
Exclusive sponsor of conference WiFi					●	
Exclusive sponsor of hotel key cards						●
Sponsor recognition and color logo featured on event signage and general session slides	●	●	●	●	●	●
Slide in sponsor ad video loop	●	●	●			
Event app — one (1) handout uploaded	●	●	●	●	●	●
Event app — banner ad	●	●	●			
Event app — listing	Sponsor page	Sponsor page	Sponsor page	Sponsor page	Sponsor page	Sponsor page

Sponsorship	Gold	Silver	Bronze	Keynote Speaker	WiFi	Branded Key Cards
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	●	●	●	●	●	●
Thought leadership or website link in post-event email	●	●				

ADDITIONAL SPONSORSHIP OPPORTUNITIES (Limited to MMI members)

Sponsorship	Evening Reception
Cost	\$15,000
Availability	Multiple
Complimentary registrations	1
Discounted registrations	10% off two (2) full price 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 on event signage and general session slides	●
Slide in sponsor ad video 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	●

ACADEMY

Date
May 19–21, 2026

Location
NYU Stern School
of Business
New York, NY

**Expected
Attendance**
50–75 (MMI
Members Only)

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.

Sponsorships for Academy are limited to MMI members.

Sponsorship	Presenting
Cost	\$7,500
Availability	Multiple (MMI Members Only)
Event display*	Tabletop space in learning center
Complimentary registration for the Academy program	1
Display branded content throughout the in-residence week at NYU	●
Recognition as sponsor of networking dinner for all attendees on Night 1 (May 19, 2026)	●
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 1 networking dinner (May 19, 2026)	●
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	●
Thought leadership or website link in post-event email	●



ALTERNATIVE INVESTMENTS FORUM

Date
Spring 2026
Location
TBA
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	Champion	Leadership	Supporting
Cost	\$15,000* / \$18,000†	\$10,000* / \$13,000†	\$6,000* / \$9,000†
Availability	2	3	4
Event display‡	Prime tabletop space	Tabletop space	Literature display on shared table
Complimentary registrations	3	2	1
Discounted registrations	10% off full price for additional registrations	10% off full price for additional registrations	10% off full price for additional registrations
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)		●	
Sponsor recognition and color logo featured on event signage and general session slides	●	●	●
Slide in sponsor ad video loop	●	●	●
Event app — one (1) handout uploaded	●	●	●
Event app — banner ad	●	●	●
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	●	●	●
Thought leadership or website link in post-event email	●	●	

LEADERSHIP PATHWAY INTENSIVE

Date
June 15–17, 2026

Expected Attendance
100–125

Location
Duke in DC
Washington, DC

Leadership Pathway is MMI's distinguished community and professional development program for emerging investment leaders with 5–10 years of experience. Leadership Pathway Intensive, an exciting three-day program delivered in conjunction with Duke Corporate Education, offers an immersive, in-person experience focused on leadership skills, strategic thinking, and real-world challenges. Support the next generation of industry leadership and build valuable relationships today with this audience of future decision makers.

Sponsorship	Champion	Leadership	Supporting
Cost	\$10,000* / \$13,000†	\$7,500* / \$10,500†	\$5,000* / \$8,000†
Availability	2	3	4
Event display‡	Prime tabletop space	Literature display on shared table	Literature display on shared table
Complimentary registrations	3	2	1
Discounted registrations	10% off full price for additional registrations	10% off full price for additional registrations	10% off full price for additional registrations
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)		●	
Sponsor recognition and color logo featured on event signage and general session slides	●	●	●
Slide in sponsor ad video loop	●	●	●
Event app — one (1) handout uploaded	●	●	●
Event app — banner ad	●	●	●
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	●	●	●
Thought leadership or website link in post-event email	●	●	

WOMEN IN ADVISORY SOLUTIONS FORUM

Date
Summer 2026

Location
TBA
New York, NY

Expected Attendance
150–175

An exciting 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. Attach your firm's brand to what is becoming one of MMI's marquee events. Sponsor this event to promote and support all the dynamic and talented women leaders at the forefront of innovation in the advisory solutions industry.

Sponsorship	Champion	Leadership	Supporting
Cost	\$10,000* / \$13,000†	\$7,500* / \$10,500†	\$5,000* / \$8,000†
Availability	2	3	4
Event display‡	Prime tabletop space	Tabletop space	Literature display on shared table
Complimentary registrations	3	2	1
Discounted registrations	10% off full price for additional registrations	10% off full price for additional registrations	10% off full price for additional registrations
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)		●	
Sponsor recognition and color logo featured on event signage and general session slides	●	●	●
Slide in sponsor ad video loop	●	●	●
Event app — one (1) handout uploaded	●	●	●
Event app — banner ad	●	●	●
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	●	●	●
Thought leadership or website link in post-event email	●	●	

ANNUAL CONFERENCE

Date
October 7–9, 2026

Location
The Westin Boston
Seaport District
Boston, MA

**Expected
Attendance**
600–650

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.

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†	\$12,000* \$15,000†	\$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 full price for additional registrations	10% off full price for additional registrations	10% off full price for additional registrations	25% off full price for one (1) registration	25% off full price for one (1) registration	25% off full price 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						●
Sponsor recognition and color logo featured on event signage and general session slides	●	●	●	●	●	●
Slide in sponsor ad video loop	●	●	●			
Event app – one (1) handout uploaded	●	●	●	●	●	●
Event app – banner ad	●	●	●			

Sponsorship	Gold	Silver	Bronze	Keynote Speaker	WiFi	Branded Key Cards
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	●	●	●	●	●	●
Thought leadership or website link in post-event email	●	●				

EXHIBIT BOOTH OPPORTUNITIES

Booth Size	Exhibit Booth (8' × 10')	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‡	●	●

ADDITIONAL SPONSORSHIP OPPORTUNITIES

Sponsorship	Opening Reception	Night 2 Reception
Cost	\$20,000* / \$23,000†	\$20,000* / \$23,000†
Availability	Multiple	Multiple
Complimentary registrations	1	1
Discounted registrations	10% off full price for two (2) additional registrations	10% off full price for two (2) additional 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 on event signage and general session slides	●	●
Slide in sponsor ad video loop	●	●
Event app — banner ad	●	●
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	●	●



ANNUITY & INSURANCE SOLUTIONS FORUM

Date
Fall 2026

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	Supporting
Cost	\$5,000* / \$8,000†
Availability	3
Event display‡	Literature display on shared table
Complimentary registration	1
Discounted registrations	10% off standard fee for additional registrations
Opportunity to introduce or close one (1) conference session	●
Sponsor recognition and color logo featured on event signage and general session slides	●
One (1) 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	●
Thought leadership or website link in post-event email	●

NATIONAL ACCOUNTS FORUM

Date
Fall 2026

Location
TBA
New York, NY

Expected
Attendance
50–75

A half-day Forum that explores the continuing evolution of National Accounts teams and how ongoing transformative changes will impact the opportunities between asset and wealth managers. Connect with distribution leaders from firms of all sizes who are focused on how distribution, product structures, and technology will advance advisor engagement and benefit their clients.

Sponsorship	Supporting
Cost	\$5,000* / \$8,000†
Availability	3
Event display‡	Literature display on shared table
Complimentary registration	1
Discounted registrations	10% off full price for additional registrations
Opportunity to introduce or close one (1) conference session	●
Sponsor recognition and color logo featured on event signage and general session slides	●
One (1) 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	●
Thought leadership or website link in post-event email	●



INSTITUTIONAL FORUM

Date
TBA, 2026
Location
TBA
New York, NY

Expected Attendance
50–75

A half-day event that convenes senior leaders whose focus is on serving the institutional marketplace to discuss challenges, opportunities, and best practices relating to serving institutional clients. Connect with this influential audience of business and distribution executives and showcase your firm's brand and offerings.

Sponsorship	Supporting
Cost	\$5,000* / \$8,000†
Availability	3
Event display‡	Literature display on shared table
Complimentary registration	1
Discounted registrations	10% off full price for additional registrations
Opportunity to introduce or close one (1) conference session	●
Sponsor recognition and color logo featured on event signage and general session slides	●
One (1) 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	●
Thought leadership or website link in post-event email	●

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



SPONSORSHIP COMMITMENT FORM

Summit

Sponsorship	MMI Members Only
Gold	\$17,500
Silver	\$13,750
Bronze	\$10,000
Keynote Speaker	\$9,000
WiFi	\$12,000
Branded Key Cards	\$9,000
Evening Reception	\$15,000

Academy

Sponsorship	MMI Members Only
Presenting	\$7,500

Alternative Investments Forum

Sponsorship	MMI Member	Non-Member
Champion	\$15,000	\$18,000
Leadership	\$10,000	\$13,000
Supporting	\$6,000	\$9,000

Leadership Pathway Intensive

Sponsorship	MMI Member	Non-Member
Champion	\$10,000	\$13,000
Leadership	\$7,500	\$10,500
Supporting	\$5,000	\$8,000

Women in Advisory Solutions Forum

Sponsorship	MMI Member	Non-Member
Champion	\$10,000	\$13,000
Leadership	\$7,500	\$10,500
Supporting	\$5,000	\$8,000

Annual Conference

Sponsorship	MMI Member	Non-Member
Gold	\$25,000	\$28,000
Silver	\$20,000	\$23,000
Bronze	\$15,000	\$18,000
Keynote Speaker	\$9,000	\$12,000
WiFi	\$12,000	\$15,000
Branded Key Cards	\$9,000	\$12,000
Exhibit Booth (8'x10')	\$10,000	\$13,000
Exhibit Tabletop (6'x30")	\$7,000	\$10,000
Opening Reception	\$20,000	\$23,000
Night 2 Reception	\$20,000	\$23,000

Annuity & Insurance Solutions Forum

Sponsorship	MMI Members	Non-Members
Supporting	\$5,000	\$8,000

National Accounts Forum

Sponsorship	MMI Members	Non-Members
Supporting	\$5,000	\$8,000

Institutional Forum

Sponsorship	MMI Members	Non-Members
Supporting	\$5,000	\$8,000

Total of All Selected _____

SPONSORSHIP COMMITMENT FORM

SPONSOR OR EXHIBITOR INFORMATION

Contact Name _____

Firm Name _____

Address _____

City _____ State _____ Zip _____

Email _____ Phone _____

Note: Please return pages 18–19 to
submit your sponsorship request

PAYMENT INFORMATION

Total from Previous Page

\$ _____

Payment by electronic funds transfer is preferred.

Please check the box below and MMI will send you an invoice to be paid by EFT.

Invoice Required ☐

If you are not able to pay by EFT, please provide your credit card information below.

Credit Card # _____

CVV _____ Exp. Date _____

Name on Card _____

Billing Address _____

City _____ State _____ Zip _____

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 _____

Date _____

Money Management Institute _____

Date _____

SEND COMMITMENT FORM VIA EMAIL TO:

jlensing@mminst.org

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.



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