

# MMI'S THRIVE INITIATIVE

is designed to champion Emerging Asset Managers (EAMs) managing less than \$25 billion in retail advisory AUM.

As part of their MMI membership, participating firms step into a supportive community built to accelerate growth, foster connections, and navigate the opportunities and challenges unique to smaller and mid-sized players in the market.

## Frequently Asked Questions

### Who should participate?

Thrive is open to all industry professionals with "corporate roles" that have an interest or direct responsibility within an emerging asset manager. Whether you are in a marketing, distribution, research, product, technology, investing or other similar role, we welcome your engagement. This community is exclusive to MMI member firms.

### I used to be part of the MMI Emerging Asset Manager Community. What is the difference?

MMI's Emerging Asset Manager Community – which brought together firms managing under \$25 billion in AUM to exchange insights and best practices – served as the foundation for MMI Thrive. The initiative now offers a more expansive platform with exclusive programming, curated content and special events.

### How often do we meet?

The Thrive community connects over three community calls a year (typically in February, July, and November) and gathers in-person each spring for the Thrive Forum and in the fall for the Executive Roundtable.

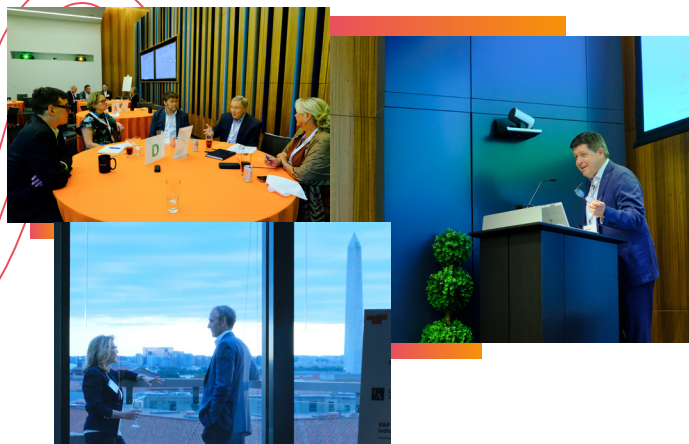
### What are the priorities and what should I expect?

You can expect MMI's Thrive initiative will give you access to an ecosystem built exclusively to help foster growth, resources, and ideas to aid your firm's development. We have events where you can engage directly with industry-leading decision makers, participate in small-group roundtable discussions, and access content curated by your peers. We are a community of asset managers gathering for the good of each other and the industry.

## More questions? Contact:

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# THRIVE

THE PREMIER DESTINATION FOR EMERGING ASSET MANAGERS

## Steering Council



**Robbie Cannon**  
**Co-Chair**

Consultant, MMI Thrive  
Money Management Institute



**Bonnie Belskis**  
**Co-Chair**

Director of National Accounts  
Confluence Investment  
Management



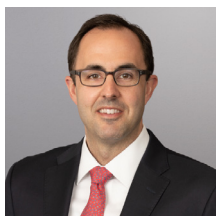
**Adam Grossman**

Global Equity CIO  
**RiverFront Investment  
Group**



**Heather Lindsey**

Head of Distribution  
Crossmark Global  
Investments



**Alexander Morris**

Chief Executive Officer &  
Chief Investment Officer  
F/m Investments, LLC



**Shelby Murphy**

Chief Marketing Officer  
**Main Management, LLC**

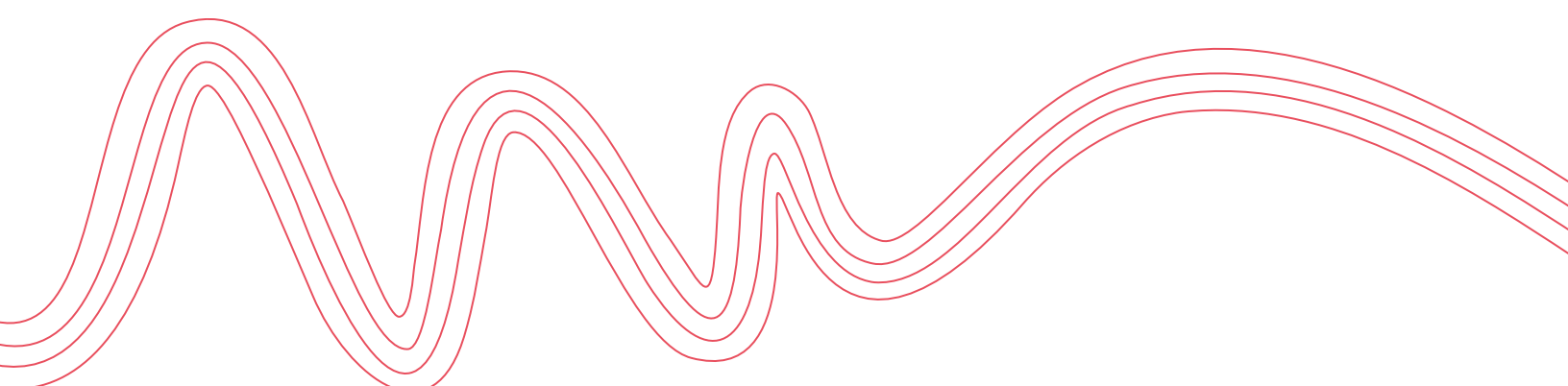


**Mark Rewey**

Managing Director  
Segall Bryant & Hamill

Whether addressing questions related to regulatory pressures, fee compression, new product launches, custodial trends, or platform gates, there continues to be a need for firms to engage market intelligence, emergent trends, and peer discussions.

Through Thrive, MMI fosters a destination for EAMs to build relationships, gain insights, and access the resources they need most to succeed in an evolving industry.



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