2027 MMI CONFERENCES AND EVENTS

SPONSORSHIP OPPORTUNITIES







PARTICIPATE WITH INTENT.

SOLVE TOGETHER.

THINK FORWARD.

MONEY MANAGEMENT INSTITUTE

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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.

SOLVE TOGETHER.

THINK FORWARD.

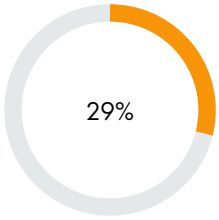
OUR MEMBER NETWORK

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.

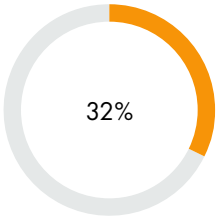
With over 200 member firms and 11,000+ professionals, MMI brings together the full spectrum of the advisory solutions industry. Our membership includes established and emerging asset managers, wealth management organizations of every model, and leading solutions providers offering technology, platforms, 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.

215 MEMBER FIRMS AS OF Q4 2026

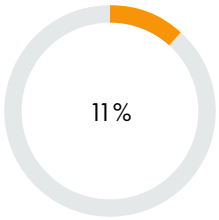
By Firm Type



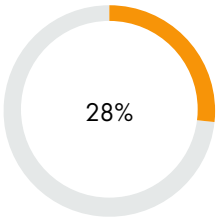
62 Asset Managers



68 Emerging Asset Managers
(AKA Thrive Members)

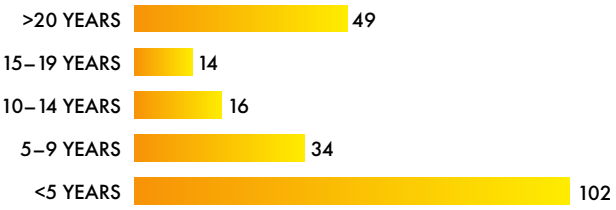


24 Wealth Managers



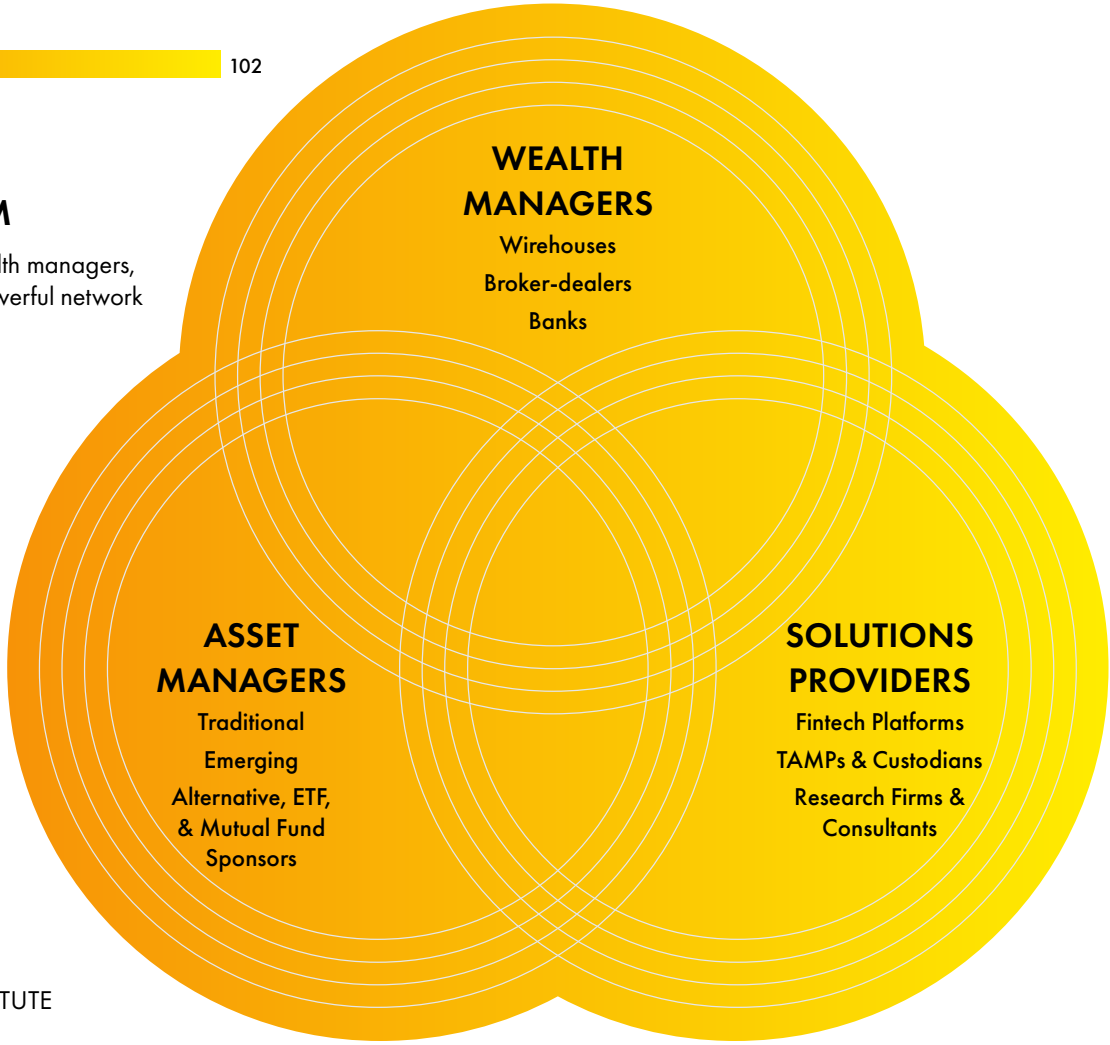
61 Solutions Providers

By Length of Membership



THE MMI ECOSYSTEM

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



2027 EVENTS CALENDAR

Signature Event

Professional Development Event

Thematic Event

Q1

Summit
March 3–5, 2027
JW Marriott Tampa Water Street
Tampa, FL

Q2

Alternative Investments Forum
April 27, 2027
Citi Headquarters
New York, NY

Leadership Pathway Intensive
June 14–16, 2027
Invesco Atlanta Headquarters
Atlanta, GA

Marketing Growth Exchange
Spring 2027
Location TBA
New York, NY

Women's Leadership Forum
Spring 2027
Location TBA
New York, NY

Q3

Academy
September 13–15, 2027
NYU Stern School of Business
New York, NY

Q4

Annual Conference
October 20–22, 2027
Omni Nashville Hotel
Nashville, TN

SUMMIT

Date
March 3–5, 2027

Location
JW Marriott
Tampa Water Street
Tampa, 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	$20,000	$15,750	$11,500	$10,500	$16,500	$12,500
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
Recognition as sponsor of the networking luncheon	●					
Recognition as sponsor of one (1) networking breakfast		●				
Recognition as sponsor of one (1) 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	$17,250
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	●

*Those who do not opt out of information sharing

ALTERNATIVE INVESTMENTS FORUM

Date
April 27, 2027

Location
Citi Headquarters
New York, NY

Expected Attendance
200–250

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	$17,250* / $21,250†	$11,500* / $15,500†	$7,000* / $11,000†
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
Possible 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	●	●	

*MMI member price †Non-member price ‡If space is available

§Those who do not opt out of information sharing

LEADERSHIP PATHWAY INTENSIVE

Date
June 14–16, 2027

Location
Invesco Atlanta Headquarters
Atlanta, GA

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. 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* / $14,000†	$7,500* / $11,500†	$5,000* / $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
Possible 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	●	●	●
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	●	●	

*MMI member price †Non-member price ‡If space is available

§Those who do not opt out of information sharing

MARKETING GROWTH EXCHANGE

Date
Spring 2027

Location
TBA
New York, NY

Expected Attendance
150

Where marketing and distribution leaders advance growth together. Growth starts with stronger connections between how firms tell their story, engage clients, and bring solutions to market. The MMI Marketing Growth Exchange brings together CMOs, their senior teams, and distribution executives across asset and wealth management to explore how closer alignment can drive greater business impact. Through candid dialogue, participants will exchange perspectives on brand differentiation, client engagement, emerging technology, and marketing's contribution to growth. Showcase your expertise, elevate your thought leadership, and build relationships with influential executives shaping the industry's future.

Sponsorship	Champion	Leadership	Supporting
Cost	$11,500* / $15,500†	$8,500* / $12,500†	$6,000* / $10,000†
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	●	●	

*MMI member price †Non-member price ‡If space is available

§Those who do not opt out of information sharing

WOMEN'S LEADERSHIP FORUM

Date
Spring 2027

Location
TBA
New York, NY

Expected Attendance
150

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	Philanthropy
Cost	$11,500* / $15,500†	$8,500* / $12,500†	$6,000* / $10,000†	$5,000* / $9,000†
Availability	2	3	4	3
Event display‡	Prime tabletop space	Tabletop space	Literature display on shared table	Literature display on shared table
Complimentary registrations	3	2	1	1
Discounted registrations	10% off full price for additional registrations	10% off full price for additional registrations	10% off full price for additional registrations	10% off full price for additional registrations
Possible 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)		●		
Recognition as sponsor of evening philanthropic activity				●
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
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
Event email communications	Logo	Logo	Logo	Logo
Recognition in event-related LinkedIn posts	●	●	●	●
Thought leadership or website link in post-event email	●	●		

*MMI member price †Non-member price ‡If space is available

§Those who do not opt out of information sharing

ACADEMY

Date
September 13–15, 2027

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 (September 13, 2027)	●
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 (September 13, 2027)	●
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	●







*If space is available

†Those who do not opt out of information sharing

ANNUAL CONFERENCE

Date
October 20–22, 2027

Expected Attendance
600–650

Location
Omni Nashville Hotel
Nashville, TN

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	$28,750* $32,750†	$23,000* $27,000†	$17,250* $21,250†	$11,000* $15,000†	$16,000* $20,000†	$12,500* $16,500†
Availability	4	5	7	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 or breakout session	●					
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	●	●	●			

*MMI member price †Non-member price

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	$11,500* / $15,500†	$8,000* / $12,000†
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

§ Additional furnishing packages available through exhibition services provider

ADDITIONAL SPONSORSHIP OPPORTUNITIES

Sponsorship	Opening Reception	Night 2 Reception
Cost	$23,000* / $27,000†	$23,000* / $27,000†
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	●	●



*MMI member price †Non-member price ‡ 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.

Paul Zettl
EVP, Chief Programming Officer
pzettl@mminst.org
(646) 868-8528







2027 MMI

SPONSORSHIP COMMITMENT FORM

Summit

Sponsorship	MMI Members Only
Gold	☐ $20,000
Silver	☐ $15,750
Bronze	☐ $11,500
Keynote Speaker	☐ $10,500
WiFi	☐ $16,500
Branded Key Cards	☐ $12,500
Evening Reception	☐ $17,250

Alternative Investments Forum

Sponsorship	MMI Member	Non-Member
Champion	☐ $17,250	☐ $21,250
Leadership	☐ $11,500	☐ $15,500
Supporting	☐ $7,000	☐ $11,000

Leadership Pathway Intensive

Sponsorship	MMI Member	Non-Member
Champion	☐ $10,000	☐ $14,000
Leadership	☐ $7,500	☐ $11,500
Supporting	☐ $5,000	☐ $9,000

Marketing Growth Exchange

Sponsorship	MMI Member	Non-Member
Champion	☐ $11,500	☐ $15,500
Leadership	☐ $8,500	☐ $12,500
Supporting	☐ $6,000	☐ $10,000

Women's Leadership Forum

Sponsorship	MMI Member	Non-Member
Champion	☐ $11,500	☐ $15,500
Leadership	☐ $8,500	☐ $12,500
Supporting	☐ $6,000	☐ $10,000
Philanthropy	☐ $5,000	☐ $9,000

Academy

Sponsorship	MMI Members Only
Presenting	☐ $7,500

Annual Conference

Sponsorship	MMI Member	Non-Member
Gold	☐ $28,750	☐ $32,750
Silver	☐ $23,000	☐ $27,000
Bronze	☐ $17,250	☐ $21,250
Keynote Speaker	☐ $11,000	☐ $15,000
WiFi	☐ $16,000	☐ $20,000
Branded Key Cards	☐ $12,500	☐ $16,500
Exhibit Booth (8'x10')	☐ $11,500	☐ $15,500
Exhibit Tabletop (6'x30")	☐ $8,000	☐ $12,000
Opening Reception	☐ $23,000	☐ $27,000
Night 2 Reception	☐ $23,000	☐ $27,000

Total of All Selected _____

2027 MMI

SPONSORSHIP COMMITMENT FORM

SPONSOR OR EXHIBITOR INFORMATION

Note: Please return pages 16–17 to submit your sponsorship request

Contact Name _____

Firm Name _____

Address _____

City _____ State _____ Zip _____

Email _____ Phone _____

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:

pzettl@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.

MONEY MANAGEMENT INSTITUTE
1410 Broadway, Suite 2601
New York, NY 10018
646-868-8500