

# ANNUAL CONFERENCE

OCTOBER 20-28

THE ADVISORY INDUSTRY'S BIGGEST EVENT

SHAPING THE FUTURE TOGETHER

Each year, MMI's Annual Conference brings together the business executives, innovators, and thought leaders at the forefront of innovation in the advisory industry. This year, even though we won't together in-person as planned, we will be **together in spirit** and with a shared commitment to advancing industry knowledge, professionalism, and collegiality. Be part of the excitement! Stay connected to the key trends and opportunities in the advisory solutions space - and to your colleagues across the industry.

#### THE 2021 MMI ANNUAL CONFERENCE:

- **When:** October 20-28, 2021
- **Format:** Virtual event with Live and On-Demand sessions
- **Expected Audience:** More than 750 participants from the industry's leading asset managers, wealth managers, and solutions providers, including senior and rising leaders from every side of the business
- **Program:** Compelling general sessions on vital topics plus five focused tracks for deeper dives on key issues
- **Flexibility:** Individual and Enterprise Pricing available
- **Discounted Group Pricing:** Enterprise Pricing makes it attractive for groups of individuals from the same firm to participate - the bigger the group, the bigger the savings!

REGISTRATION NOW OPEN  
[LEARN MORE](#)

#### WHAT TO EXPECT:

- **Exciting speakers and timely topics:** An all-star roster of speakers addressing everything from how the pandemic has rewritten the rules of client engagement to how blockchain will transform financial services, what the Biden administration's regulatory agenda will mean for the advisory business, and preparing yourself and your team for the future of work
- **Focused subject matter tracks:** Build a personalized agenda to suit your own needs and interests
- **An enhanced and extended experience:** Online discussion groups, virtual networking sessions, and access to any sessions you miss live for three months after the event

**About the Money Management Institute:** 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. Through conferences, educational resources, and thought leadership, MMI facilitates peer-to-peer connections, fosters industry knowledge and professionalism, and supports the development of the next generation of industry leadership. MMI member firms are dedicated to helping individual and institutional investors, at every level of assets, plan for and fulfill their financial goals. For more information, visit [www.MMInst.org](http://www.MMInst.org).



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## ENTERPRISE PRICING OPTIONS

**THE MORE TEAM MEMBERS YOU SEND, THE MORE YOU SAVE!**

**With the accelerated pace of change in our industry, shouldn't your team be on top of the latest information, trends, and best thinking?**

Luckily, it has never been easier or more affordable to participate in the MMI Annual Conference, the advisory solutions industry's most important event of the year. The virtual format means more individuals from your firm can participate – right from the comfort and safety of their own home or office. To facilitate broader participation and access to the conference experience, MMI offers discounted Enterprise Pricing options.

### CHOOSE THE PACKAGE THAT WORKS BEST FOR YOU:

Registration Package	Total Cost	Per Person Cost	Per Person Savings
50 Participants	\$24,750	\$495	50%
20 Participants	<b>\$13,900</b>	<b>\$695</b>	<b>30%</b>
15 Participants	\$11,250	\$750	25%
10 Participants	\$7,950	\$795	20%
5 Participants	\$4,475	\$895	10%
Individual (Early Rate)	\$995	\$995	N/A



For **LESS** than the total cost of sending 5 participants to 2019's in-person conference, **20** members of your team can participate in this year's virtual event\*

\*Based on 2019 Advance Registration fee of \$1,795 & estimated hotel/travel costs

### EACH CONFERENCE PASS INCLUDES ACCESS TO:

- 25+ hours of Live and On-Demand content featuring a who's-who of industry leaders and can't-miss topics
- ALL General Sessions
- ALL sessions in EACH subject matter Track: Distribution, Leadership, Product Development, Retirement and Tools & Technology

### 5 EASY STEPS:

- Contact MMI for details and the Enterprise Pricing Commitment Form at [events@mminst.org](mailto:events@mminst.org) or (646) 868-8500.
- Complete the Enterprise Pricing Commitment Form and send it to Samantha Lustig at [slustig@mminst.org](mailto:slustig@mminst.org).
- MMI will invoice your firm and generate a custom registration code for your firm's use.
- Share the code and conference registration link with your designated participants so they can enroll.
- Upon enrollment, each participant will receive a personalized confirmation with links to access the conference sessions.