



Sponsor/Exhibitor Invitation & Prospectus

# 2015 MMI Annual Convention

April 22–23, 2015

The Westin Charlotte

Charlotte, North Carolina



**CONNECT**



**KNOW**



**GROW**

*Conference Co-Chairs:*

**Michael Lewers**

Head of Private Client Sales  
BlackRock

**Jeff Wilk**

Head of Wealth Management  
MetLife Broker Dealer Group

**RESERVE NOW!** Limited Space Available!

## Plan to attend the 2015 MMI Annual Convention

Join us for the **2015 MMI Annual Convention**—a two-day exploration of the changes occurring in our industry, their implications for the way we do business, and how they are shaping the future of advisory solutions.

MMI's conferences are one of the key ways we help our members to **Connect, Know and Grow**. We expect that over 350 executives from leading financial services firms will join us at the **Annual Convention** to gain insight on strategies and tactics that will enable them to manage and profit from the latest trends in the advisory solutions marketplace.

**For conference sponsors and exhibitors, the Annual Convention represents an exceptional opportunity to meet with industry executives, gain strategic insights and highlight your firm's products and services.**

### Member Profile

Executive management of:

- Sponsors and investment management firms
- Wirehouses
- Independent broker-dealers
- Regional and insurance broker-dealers
- Banks
- RIAs
- Custodians
- Technology and service provider firms
- Mutual fund and ETF providers
- Alternative investment providers

The **2015 MMI Annual Convention** is tailored to the specific needs of executive management in the managed solutions industry. This is an excellent chance to network with—and showcase your firm's solutions to—a highly-engaged group of senior decision-makers.

### Who Should Sponsor or Exhibit

- Technology and service providers
- Data information/management firms
- Sponsors and investment managers
- Industry media and publications
- Turnkey asset management firms
- Executive search firms
- Industry consultants and research firms

### Don't Miss This Opportunity!

Sponsors and exhibitors receive maximum exposure throughout the conference. And unlike many other industry conferences, MMI also provides you with the opportunity for interaction with over 350 top industry decision-makers participating in the event, including:

- All refreshment breaks and meal functions held in Exhibit Area through Thursday breakfast
- The Exhibitors' reception for all conference participants
- Longer networking and refreshment breaks

Exhibitors also receive:

- Two complimentary registrations, including all sessions
- Pre-conference attendee list (emailed two weeks prior to conference)
- Description listing in conference program
- Description listing in conference mobile app
- Post-conference attendee list

### Additional Opportunities to Maximize Your Company's Exposure

#### Display Advertising

Limited opportunities are available for display advertising in the conference program, which is distributed on-site to all attendees.

Fee: Full page 8.5" x 11"—\$1,500

Format: High resolution pdf files preferred

Other formats accepted:

- Illustrator 11 (eps), Photoshop 8 (300-dpi tif or eps), or Quark XPress 6.5. When sending files in these formats, please include all placed images and fonts (Mac only) used in the final art.
- Black and white or process color
- Page size: Full 8.5" x 11"
- Live area: 8" x 10.5"

Submit advertising art files to: [lpierre@mminst.org](mailto:lpierre@mminst.org)

**DEADLINE: MARCH 27, 2015**



## 2015 Annual Convention On-Site Event Sponsorships

Sponsorship opportunities are available for certain attendee items as well as meals and special events throughout the conference. Sponsors receive public recognition through signage at each sponsored event, in a conference program listing, in the conference mobile app, and in other conference promotional literature.

### Sponsorship Opportunities

WiFi .....	2 @ \$2,500
Wednesday Refreshment & Networking Break .....	\$2,500
Wednesday Cocktail Reception .....	\$3,500
Wine Sponsorship for Gateway to Leadership Fundraiser Dinner .....	\$5,000
Thursday Breakfast .....	\$2,500
Thursday Keynote Speaker .....	2 @ \$7,500
Hotel Room Keycards .....	(Taken) \$2,500
Name Tag Lanyards .....	(Taken) \$500*
Charging Kiosk .....	\$2,500
Conference Program Book .....	2 @ \$2,500
Conference Program Ad Full Page .....	\$1,500
Registration Bag or Giveaway .....	\$500*
Insert Material .....	\$500*

\*Sponsor firm must produce and deliver item

### Elite Sponsorships

**Platinum (1 available) .....** \$12,500

Program includes 3 free registrations, double exhibitor booth, full page ad in conference program, and acknowledgments listed below.

**Gold (1 available; 1 taken) .....** \$10,000

Program includes 2 free registrations, exhibitor booth, full page ad in conference program, and acknowledgments listed below.

**Silver (1 available; 2 taken) .....** \$7,500

Program includes 2 free registrations, exhibitor booth, half page ad in conference program, and acknowledgments listed below.

Each elite-level sponsorship will be acknowledged throughout the event by:

- Logo and signage including any monitors if used
- Logo and acknowledgment on MMI Website and any media partner ads
- Logo and acknowledgment in mobile conference application
- Logo and acknowledgment in all invitations and promotions
- Logo and acknowledgment in conference program distributed to all attendees
- Logo and acknowledgment in general session via presentation slides
- Electronic list of attendees prior to and after event



Sponsor the charging kiosk for smartphones and iPads. Your firm logo and custom slide or video presentation will be displayed on the 42" LCD monitor.

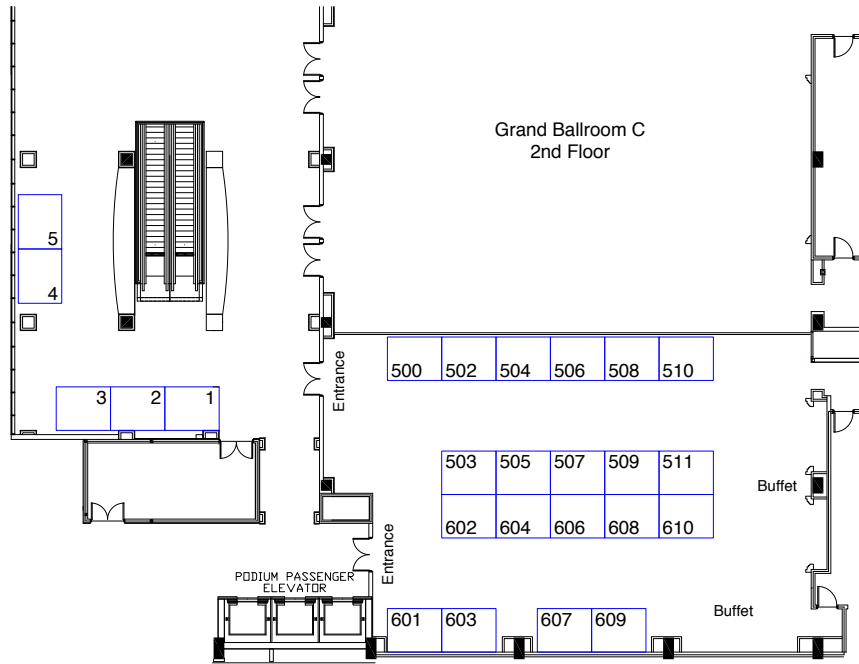


Sponsor the WiFi connection that attendees use to access the conference materials onsite. Your firm logo will be prominently displayed on the login page.

## Sponsorship opportunities contact:

Money Management Institute  
(202) 822-4949  
events@mminst.org

**Exhibit Hall • The Westin Charlotte • Charlotte, North Carolina**



**Exhibitor Information**

- Booth Size: 8' deep x 10' wide
- Exhibit Fee: \$4,500 member/\$5,500 non-member

**Complete Package Includes:**

- 8' high back wall and 3' high side rail
- One (1) 6' x 30" high draped table (uniform in color)
- Two (2) upholstered side chairs
- One (1) 7" x 44" one-line ID sign
- One (1) wastebasket
- Exhibitor service kit
- Security
- Two complimentary conference registrations
- Pre-conference attendee list (emailed two weeks prior to conference)
- Description listing in conference program
- Description listing in conference mobile app
- Post-conference attendee list

**Exhibit Hall Schedule**

**Wednesday, April 22**

- 10:00 AM–NOON** Move In
- 1:00 PM–6:30 PM** Exhibit Hours
- 3:15 PM–3:45 PM** Refreshment and Networking Break with Exhibitors
- 5:00 PM–6:30 PM** Reception and Networking with Exhibitors

**Thursday, April 23**

- 7:30 AM–8:45 AM** Breakfast and Networking with Exhibitors
- 9:00 AM–11:00 AM** Dismantle/Move Out

**Hotel Accommodations**

**The Westin Charlotte**  
601 South College Street  
Charlotte, NC 28202  
(704) 375-2600

For reservations, call 1-866-837-4148 and reference the **2015 MMI Annual Convention**.

**The MMI group rates of \$209/single and \$209/double plus taxes per night are available until April 1, 2015.**

**Exhibitor and booth info contact:**

**Linda Pierre**  
Conference and Events Coordinator  
Money Management Institute  
Cell: (720) 940-5174  
lpierre@mminst.org



MMI 2015 ANNUAL CONVENTION  
SPONSORSHIP & EXHIBIT OPPORTUNITIES

Exhibit Space and Sponsorship Application

Sponsor or Exhibitor Information

Contact Name: \_\_\_\_\_ Company: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Email: \_\_\_\_\_

2015 Annual Convention Sponsorships & Exhibit Booths

- Platinum Sponsorship—\$12,500
- Gold Sponsorship—\$10,000
- Silver Sponsorship—\$7,500
- WiFi—\$2,500
- Wednesday Refreshment & Networking Break—\$2,500
- Wednesday Cocktail Reception—\$3,500
- Wine Sponsorship for Gateway to Leadership Fundraiser Dinner—\$5,000
- Thursday Breakfast—\$2,500
- Thursday Keynote Speaker—\$7,500
- N/A Hotel Room Keycards—\$2,500
- N/A Name Tag Lanyards—\$500\*
- Charging Kiosk—\$2,500
- Conference Program Book—\$2,500
- Conference Program Ad Full Page—\$1,500
- Registration Bag or Giveaway—\$500\*
- Insert Material—\$500\*
- Exhibit Booth MMI Member—\$4,500
- Exhibit Booth Non-Member—\$5,500

\* Sponsor firm must produce and deliver item

2015 Annual Convention Booth Selection and Exhibitor Registration

Web: Register all Exhibitor Attendees at [www.MMIinst.org](http://www.MMIinst.org) starting March 1, 2015.

Follow the links to the Annual Conference registration page and email [events@mminst.org](mailto:events@mminst.org) for the Exhibitor discount code to use when registering your exhibitor attendees.

After referring to the floor plan, please indicate your preferred booth by space number.

1<sup>st</sup> Choice \_\_\_\_\_ 2<sup>nd</sup> Choice \_\_\_\_\_ 3<sup>rd</sup> Choice \_\_\_\_\_ 4<sup>th</sup> Choice \_\_\_\_\_

Payment Information

Total Amount Due (enter Total for items selected above): \_\_\_\_\_

Applications will not be processed without payment. Make checks payable to *Money Management Institute*.

Check enclosed  Check to be mailed  VISA  MasterCard  American Express

Credit Card #: \_\_\_\_\_ Exp. Date: \_\_\_\_\_

Name on Card: \_\_\_\_\_  
(if different than the contact above)

Address on Card: \_\_\_\_\_  
(if different than the contact above)

Signature: \_\_\_\_\_

SIGN HERE

**Cancellation Policy:** Cancellations must be in writing. Refunds will be given to all requests received by 5:00 PM on March 27, 2015, less a \$100 processing fee. No refunds will be given after March 27, 2015 or for no shows. For cancellations after March 27, 2015, 85% of the fees paid will be offered as a credit against a sponsor/exhibitor package at a future MMI event (subject to availability).

Send Application via:

Fax: (202) 822-5188  
Mail: Money Management Institute, 1737 H Street NW,  
5th Floor, Washington, DC 20006

Please email [lpierre@mminst.org](mailto:lpierre@mminst.org) a brief company description (maximum 75 words) along with your logo when submitting application. Your company description and logo will be advertised free of charge in the conference program and mobile app.

MMI PERSONNEL ONLY:

Assigned Exhibit Space \_\_\_\_\_ Date \_\_\_\_\_ Received \$ \_\_\_\_\_ Date \_\_\_\_\_