



Sponsor/Exhibitor Invitation & Prospectus

2016 MMI Annual Convention

April 20–21, 2016
Marriott Marquis DC
Washington, DC



CONNECT



KNOW



GROW

Conference Co-Chairs:

Ron Fiske,
Managing Director
Envestnet

Brett Wright
Senior Vice President
Head of Third Party Distribution
Delaware Investments

Gold Sponsors



Silver Sponsors



RESERVE NOW! Limited Space Available!



2016 MMI Annual Convention: A Unique Opportunity to Create Brand Awareness and Build Relationships

Join us for the 2016 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 375 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 **2016 MMI Annual Convention** is tailored to the specific needs of executive management in the advisory 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
- Emerging asset managers
- Industry media and publications
- Platform sponsor firms
- Turnkey asset management firms
- Executive search firms
- Industry consultants and research firms

Our Event Attendees*

67%

C-Suite/EVP/SVP/MD

42%

Asset Manager Firms

51%

Sales/Distribution Leaders

27%

Director/Manager/VP

30%

Platform Sponsor Firms

24%

Product/Platform Strategy Leaders

**based on 2015 MMI Annual Convention*



2016 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 an electronic conference program listing, in the conference mobile app, and in other conference promotional literature.

Sponsorship Opportunities

Keynote Speaker	\$7,500
WiFi	2 @ \$2,500
Cocktail Reception	\$3,500
Breakfast	\$2,500
Luncheon	\$5,000
Refreshment and Networking Break	2 @ \$2,500
Wine Sponsorship for Gateway to Leadership Fundraiser Dinner	\$5,000
Solutions Provider Spotlight Session (10 minutes)	\$2,500
SOLD Hotel Room Keycards	\$2,500
SOLD Name Tag Lanyards	\$1,500*
Charging Tables (8 available)	2 tables per sponsor @ \$1,000
Electronic Conference Program Ad Full Page	\$1,500
Registration Bag or Giveaway	\$500*
Insert Material	\$500*

*Sponsor firm must produce and deliver item



Branded Charging Tables
Sponsor the charging tables for mobile devices. The tables will be placed throughout the exhibit hall and foyer. Your company logo will be displayed on the charging tables for attendees to see while charging devices.



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

Elite Sponsorships

Platinum (1 available) \$12,500

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

Gold SOLD \$10,000

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

Silver (1 available; 2 SOLD) \$7,500

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

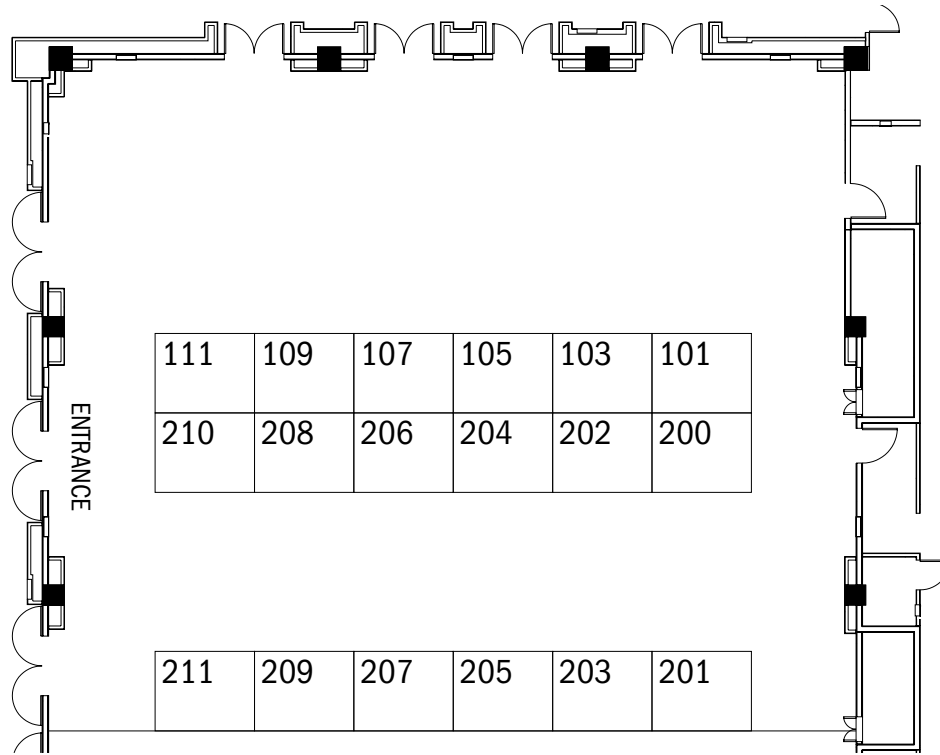
Each elite-level sponsorship will be acknowledged throughout the event by:

- 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 electronic conference program distributed to all attendees
- Logo and acknowledgment in general session via presentation slides
- Electronic list of attendees prior to and after event

Sponsorship opportunities contact:

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

Exhibit Hall • Marriott Marquis DC • Washington, DC



Exhibitor Information

- Booth Size: 10'x10'
- Exhibit Fee: \$5,500 member/\$6,500 non-member

Complete Package Includes:

- 8' high back wall and 3' high side rail
- Two Chairs
- Choice of Table **NEW**
 - 6' rectangle
 - 36"x30" round
 - 36"x42" round
 - or Upgrade to two 36"x42" rounds for additional charge

- One (1) 7" x 44" one-line ID sign
- One (1) wastebasket
- Exhibitor service kit
- Security
- Two complimentary registrations, including all sessions
- All refreshment breaks and most meal functions held in Exhibit Area
- The Exhibitors' reception for all conference participants
- Longer networking and refreshment breaks
- Description listing in conference mobile app
- Description listing in electronic conference program
- Pre-conference attendee list (emailed two weeks prior to conference)
- Post-conference attendee list



Exhibitor and booth info contact:

Linda Pierre
Conference and Events Coordinator
Money Management Institute
(202) 822-4949
lpierre@mminst.org



Exhibit Hall Schedule

Wednesday, April 20

- 10:00 AM–NOON** Move In
- NOON–6:30 PM** Exhibit Hours
- 3:30 PM–4:00 PM** Refreshment and Networking Break with Exhibitors
- 6:15 PM–7:15 PM** Reception and Networking with Exhibitors

Thursday, April 21

- 7:00 AM–8:00 AM** Breakfast and Networking with Exhibitors
- 10:00 AM–10:30 AM** Refreshment and Networking Break
- 10:30 AM–NOON** Dismantle/Move Out

Hotel Accommodations

Marriott Marquis DC
 901 Massachusetts Avenue NW
 Washington, DC 20001
 (704) 375-2600

For reservations call 877-212-5752 or book online at https://resweb.passkey.com/Resweb.do?mode=welcome_ei_new&eventID=13996956.

The MMI group rate of \$369 plus taxes per night is available until Friday, March 25, 2016.

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 375 top industry decision-makers participating in the event, including:

- All refreshment breaks and most 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 electronic 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 electronic 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

DEADLINE: MARCH 25, 2016



MMI 2016 ANNUAL CONVENTION SPONSORSHIP & EXHIBIT OPPORTUNITIES

Exhibit Space and Sponsorship Application

Sponsor or Exhibitor Information

Contact Name: _____ Company: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Fax: _____ Email: _____

2016 Annual Convention Sponsorships & Exhibit Booths

- Platinum Sponsorship—\$12,500
- Refreshment and Networking Break—\$2,500
- Charging Tables—\$1,000
- SOLD** Gold Sponsorship—\$10,000
- Silver Sponsorship—\$7,500
- Wine Sponsorship for Gateway to Leadership Fundraiser Dinner—\$5,000
- Electronic Conference Program Ad Full Page—\$1,500
- Keynote Speaker—\$7,500
- WiFi—\$2,500
- Fundraiser Dinner—\$5,000
- Registration Bag or Giveaway*—\$500
- Cocktail Reception—\$3,500
- Solutions Provider Spotlight—\$2,500
- Insert Material*—\$500
- Breakfast—\$2,500
- SOLD** Hotel Room Keycards—\$2,500
- Exhibit Booth MMI Member—\$5,500
- Luncheon—\$5,000
- SOLD** Name Tag Lanyards*—\$1,500
- Exhibit Booth Non-Member—\$6,500

* Sponsor firm must produce and deliver item

2016 Annual Convention Booth Selection

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

1st Choice _____ 2nd Choice _____ 3rd Choice _____ 4th Choice _____

Included in package (choose one):

- 6' rectangle table with two chairs
- 36" x 30" round table with two chairs
- 36" x 42" round table with two chairs

Optional upgrade (additional discounted rate of \$380)

- (2) 36" x 42" round tables with 4 chairs (additional discounted rate of \$380)

You will receive an email containing your booth confirmation and registration instructions following payment processing.

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 25, 2016, less a \$100 processing fee. No refunds will be given after March 25, 2016 or for no shows. For cancellations after March 25, 2016, 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 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 electronic conference program and mobile app.

MMI PERSONNEL ONLY:

Assigned Exhibit Space _____ Date _____ Received \$ _____ Date _____