



## EVENT SUMMARY

INVESTMENT ADVISOR FORUM	DATES	VENUE	ATTENDEES	EXHIBITORS
<p>Investment advisors and wealth managers are drawn to this long-standing marquee New York metropolitan-area event. An impressive lineup of speakers covers a variety of topics including portfolio management, alternative investments, investment allocation, investment policy, wealth management, and timely discussions about the U.S. and world economies.</p> <p><i>Sponsor: \$25,000</i> <i>Exhibitor: \$15,000</i></p>	<p>February 9–10, 2017</p>	<p>New York Hilton, New York</p>	<p>800</p>	<p>40</p>
ANNUAL CONFERENCE EXPERIENCE—ACE				
<p>IMCA's Annual Conference Experience is the largest association gathering of investment and private wealth advisors in the industry. Sessions feature leading industry strategists, academic thought leaders, and existing or future Nobel laureates. Our exhibit hall prominently features trend-setting products and services from more than 100 supporting firms.</p> <p><i>Sponsor: \$35,000</i> <i>Exhibitor: \$15,000</i></p>	<p>April 30–May 3, 2017</p>	<p>San Diego Convention Center San Diego, CA</p>	<p>1,500+</p>	<p>100+</p>
PRIVATE WEALTH ADVISOR CONFERENCE				
<p>A must-attend event that is designed for IMCA members, CPWA designees, wealth managers, and top advisors who manage the complex needs of high-net-worth clients. IMCA's Private Wealth Advisor Conference will discuss the most critical topics in wealth management today.</p> <p><i>Sponsor: \$20,000</i> <i>Exhibitor: \$12,000</i></p>	<p>November 2017</p>	<p>TBD</p>	<p>450</p>	<p>30</p>



## EVENT SUMMARY (CONTINUED)

MASTERS SERIES: ADVANCED BUSINESS STRATEGIST	DATES	VENUE	ATTENDEES	EXHIBITORS
<p>Presented by academic faculty from top business schools around the world and supplemented by business coaches, consultants, and leading practitioners, this program is for senior-level registered investment advisors and team leaders who are dedicated to acquiring the knowledge and skills necessary to build their practice into a business, or their business into an enterprise.</p> <p><i>First Rights: Platinum and Gold Partners Only</i> <i>Additional sponsors subject to availability: \$15,000</i></p>	<p>May 1– 2, 2017</p>	<p>San Diego Convention Center, San Diego, CA</p>	<p>100</p>	<p>8</p>
MASTERS SERIES: ADVANCED INVESTMENT STRATEGIST INSTITUTE				
<p><b><i>In collaboration with Wharton</i></b></p> <p>IMCA's new Masters Series is designed for financial professionals who want to continually enhance their knowledge and be challenged with ideas and approaches that expand their thinking. This a 1 ½ day program, delivered by Wharton, will cover financial topics including: advanced asset allocation, international investing, behavioral finance, alternative investments, global macro economics, and outlook for the economy. Additional topics may include: how to influence decisions through choice architecture, influence and persuasion, and marketing for financial advisors. Professors may include Richard Marston, Chris Geczy, Jules van Bins Bergen, Nikolai Rossana, Katie Milkman, Mario Moussa, and Keith Biedermeier. This his advanced coursework will help financial professionals be more effective and better prepared for any given market climate in addition to helping them build their businesses.</p> <p><i>First Rights: Platinum and Gold Partners Only</i> <i>Additional sponsors subject to availability: \$15,000</i></p>	<p>September 11–12, 2017</p>	<p>Inn at Penn, A Hilton Hotel Philadelphia, PA</p>	<p>200</p>	<p>8</p>

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Contact your Key Accounts Director if interested in sponsoring these events.



## EVENT SUMMARY (CONTINUED)

FOCUS SERIES	DATES	VENUE	ATTENDEES	EXHIBITORS
<p><b><i>Disruptive Trends in regulation, investing, wealth management, business, and technology</i></b></p> <p>With a focus on deep-dive topics explored by leading subject matter experts, these one-day seminars have become among IMCA's most popular and highest-rated offerings. Align your firm's brand and thought leadership with any number of topics that will profoundly change the practice of investment and wealth management.</p>	<p>Spring Summer Fall Winter</p>	<p><b>Focus on Fiduciary</b>— Washington DC <b>Focus on Impact Investing</b>—Toronto <b>Focus on Business &amp; Technology</b>—San Jose <b>Focus on Passive Strategies</b>—Atlanta <b>Focus on Tax Planning</b>—Dallas Note: Topics and cities subject to change</p>	<p>100–150 per event</p>	<p>up to 10 per event</p>

Benefits at each event:	SPONSORSHIP \$15,000 PER EVENT	EXHIBITOR \$7,500 PER EVENT
One 6' tabletop exhibit at conference	●	●
Complimentary registrations	3	2
Discounts on publication sponsorships	5%	
Verbal sponsor recognition and color logo featured in select slide shows	●	
Color logo on conference pages of website with link to firm homepage	●	Listing with link
Logo in conference promotional materials	●	
Logo and description in onsite materials	●	Description only
Color logo and firm description in conference app with link to firm homepage	●	Description and link only
Rights to pre- and post-conference use of attendee list (mailer must be preapproved, no e-mail addresses are released)	2x	1x