

**Morningstar®
ETF Conference**

**Chicago
2017**

Sponsorship Kit

Morningstar® ETF Conference

Chicago 2017

**Hyatt Regency
Chicago
Sept. 6–8, 2017**

The Morningstar ETF Conference brings together financial advisors, asset managers, and industry experts to discuss investing strategies and the ETF marketplace. This audience of engaged financial professionals is looking for ideas and solutions to make better-informed decisions for their clients.

At last year's event, more than 600 attendees walked the exhibit hall to meet with providers and network with other industry professionals. An ETF Conference sponsorship is a limited and exclusive opportunity to showcase your products and services and get in front of key investment decision-makers looking for answers.

The Morningstar ETF Conference caters to asset management firms that create their own ETF strategies and also to the do-it-yourself advisor managing money on behalf of his or her clients. As sponsors, ETF providers can reach both groups seeking products to use in managing assets, whether it's the independent financial planner or a portfolio manager creating strategies to be sold on advisor platforms.

Firms looking to increase the usage on their platforms also benefit greatly by sponsoring the conference. Investment advisors attend to learn about new tactics, product offerings, and options available to best run their businesses. As a sponsor, you can demonstrate the services, solutions, and strategies that you have available for financial planners to better serve their clients.

Sponsorship packages for the eighth-annual Morningstar ETF Conference are available on a limited basis and will sell out fast. To reserve one of these limited sponsorship opportunities, please contact:

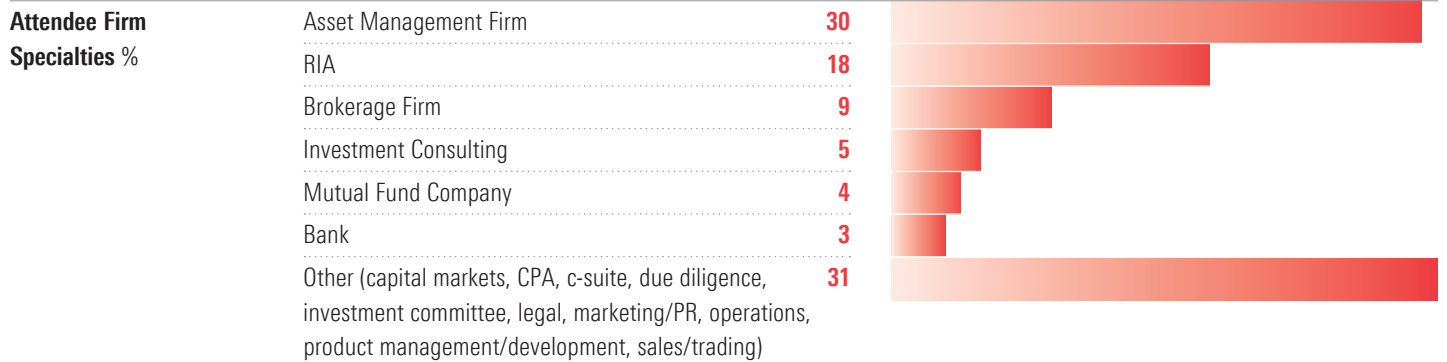
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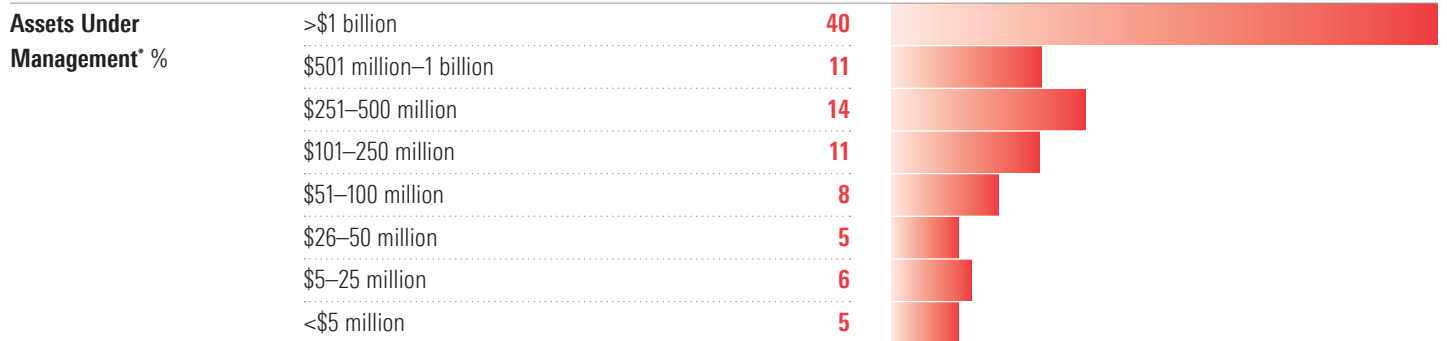
2016 Conference Statistics

Sponsorship at the Morningstar® ETF Conference is one of the most effective ways to reach those who make decisions about buying your products and services. Sponsoring

the conference maximizes your firm's visibility to reach a captive audience of experienced financial professionals, as evidenced by these statistics from the 2016 conference.



Source: 2016 Morningstar ETF Conference Attendee



* Of the 60% of attendees that manage assets.
Source: 2016 Morningstar ETF Conference Attendee Registration Data



Source: 2016 Morningstar ETF Conference Attendee Survey

Sponsorship

Principal

\$65,000

Exclusive sponsorship

The Principal sponsorship of the 2017 Morningstar ETF Conference is an opportunity to be a key part of the attendee experience. Your company will be on display with priority placement and a double booth in the main exhibit hall. Your logo will appear on the conference mobile app and you will receive sponsorship of the Wi-Fi network.

As the Principal Sponsor, you will be the exclusive sponsor for the sit-down luncheon. Sponsorship also includes five exhibitor conference registrations, five advisor guest passes, and logo placement in emails, direct mail marketing, and on the 2017 Morningstar ETF Conference website.

- ▶ 20' × 8' booth with priority placement
- ▶ Sit-down luncheon sponsor
- ▶ Mobile app
- ▶ Wi-Fi sponsor
- ▶ Five exhibitor conference registrations
- ▶ Five advisor guest conference passes
- ▶ Logo on website, email, and direct mail marketing
- ▶ One-time use pre- and post-conference attendee list

Lead

\$45,000

2 available

There are two Lead sponsorships available for the 2017 Morningstar ETF Conference. This is an excellent chance to increase your visibility throughout the event. As a Lead Sponsor, you have the opportunity to sponsor one of the cocktail receptions held in the exhibit hall and logo placement on either the conference pen or notebook distributed to all attendees upon registration.

Sponsorship also guarantees exhibit hall space, four exhibitor conference registrations, five advisor guest passes, and logo placement in emails, direct mail marketing, and on the 2017 Morningstar ETF Conference website.

- ▶ 10' × 8' booth
- ▶ Cocktail reception sponsor
- ▶ Pen (1) or notebook (1)
- ▶ Four exhibitor conference registrations
- ▶ Five advisor guest conference passes
- ▶ Logo on website, email, and direct mail marketing
- ▶ One-time use pre- and post-conference attendee list

Major

\$35,000

5 available

Five Major sponsorships are available for the 2017 Morningstar ETF Conference. Be recognized as either a breakfast or break sponsor to increase your presence at the event. As a Major Sponsor, you will also receive an insert included in each attendee bag, along with booth space, three exhibitor conference registrations, five advisor guest passes, and logo placement in emails, direct mail marketing, and on the 2017 Morningstar ETF Conference website.

- ▶ 10' × 8' booth
- ▶ Bag insert
- ▶ Breakfast sponsor (2) or break sponsor (3)
- ▶ Three exhibitor conference registrations
- ▶ Five advisor guest conference passes
- ▶ Logo on website, email, and direct mail marketing
- ▶ One-time use pre- and post-conference attendee list

Associate

\$20,000

limited availability

Associate sponsorships are available for those who want to exhibit at the 2017 Morningstar ETF Conference and feature their names and logos in conference marketing. Associate Sponsors will get booth space with two exhibitor conference registrations, two advisor guest passes, and placement in emails, direct mail marketing, and on the 2017 Morningstar ETF Conference website.

- ▶ 10' × 8' booth
- ▶ Two exhibitor conference registrations
- ▶ Two advisor guest conference passes
- ▶ Logo on website, email, and direct mail marketing
- ▶ One-time use pre- and post-conference attendee list

Additional Sponsorship Opportunities

Hotel Key Card With Logo

\$10,000

1 available

Upon check-in at the Hyatt Regency, all conference attendees will receive a hotel key card branded with your company logo.

Shoe Shine Station

\$7,000

1 available

Expand your presence by offering attendees a shoe shine at a separate station in the walkway by the exhibit hall.

Morningstar magazine, full-page, four-color ad

\$5,500

1 available

Upgrade your sponsorship with a full-page ad in the Aug/Sept issue of *Morningstar* magazine. 60,000 *Morningstar* magazine subscribers will receive their issue in early Aug. 2017.

Morningstar Magazine

The magazine of independent research for the world's financial professionals.

Morningstar magazine reflects our global reach, demonstrating the full scope of our independent thinking and original research through relevant content for all types of financial professionals including institutional investors and advisors. *Morningstar* magazine is published six times a year and mailed to a subscriber base of 60,000 and distributed to Morningstar's global offices.

As a conference sponsor, your company can upgrade your sponsorship with a full-page ad for an additional fee in the Aug/Sept issue of *Morningstar* magazine.

What readers say:

"Content is well-researched, from a highly trusted source."

"*Morningstar* magazine has the best articles, information, and investment advice."

"Has the depth and breadth and quality information relating to capital markets and money manager opinions."

"Offers insights not typically found elsewhere; merges economic commentary with investment analysis."
—2016 Readex Research readership study

Additional Information

Location

Hyatt Regency Chicago
151 East Wacker Drive
Chicago, Illinois 60601
+1 312 565-1234

Registration Fees

Additional Sponsor Attendee—**\$600**
Attendee—**\$600**
Early Bird Attendee Price (by July 28, 2017)—**\$475**

Cancellations

Sponsorship fees are 100% refundable if Morningstar receives a written cancellation notice by April 28, 2017. No refunds will be given after April 28, 2017.

Contact

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MORNINGSTAR®

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