

**Morningstar<sup>®</sup>**  
**ETF Conference**  
2014 Sponsor Kit



## Morningstar ETF Conference September 17–19, 2014 Sheraton Chicago

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 fifth-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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+1 312 696 6151



## Sponsorship

### **Principal** (exclusive opportunity)

**\$55,000**

The Principal sponsorship of the 2014 Morningstar ETF Conference is an opportunity to be a key part of the attendee experience. Your company will be on display with priority placement 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. You will receive two passes to our invitation-only managed portfolios dinner for a great networking opportunity with upper-level asset managers. Sponsorship also includes five exhibitor conference registrations, five advisor guest passes, and logo placement in print ads, emails, direct mail marketing, and on the 2014 Morningstar ETF Conference website.

- ▶ 6' × 2' table with priority placement
- ▶ Sit-down luncheon sponsor
- ▶ Mobile app
- ▶ Wi-Fi sponsor
- ▶ Five exhibitor conference registrations
- ▶ Five advisor guest conference passes
- ▶ Two managed portfolios dinner passes
- ▶ Logo on website, print, email, and direct mail marketing
- ▶ One-time use pre- and post-conference attendee list

### **Managed-Portfolios Sponsor** (exclusive opportunity) **\$50,000**

The Managed-Portfolios sponsorship is an exciting opportunity to increase your exposure to both advisors and portfolio managers.

As the Managed-Portfolios Sponsor, you will get to invite eight management firms who specialize in ETF portfolio construction. These firms will have the chance to attend the conference and discuss their strategies with advisors and platform providers, with the assistance of your sponsorship. These management firms will receive recognition on conference signage and in the attendee conference guide. Management firms can also bring collateral to display at the conference.

Your footprint will extend beyond asset managers with your logo on the hotel keycard received by all attendees staying at the Sheraton Chicago Hotel. You will get priority placement in the exhibit hall, along with a double booth. Sponsorship also includes five exhibitor conference registrations, two managed portfolios dinner passes, and logo placement in print ads, emails, direct mail marketing, and on the 2014 Morningstar ETF Conference website.

- ▶ 6' × 2' tables with priority placement
- ▶ Exhibit space for invited firms
- ▶ Hotel keycard sponsor
- ▶ Five exhibitor conference registrations
- ▶ Eight portfolio manager invitations
- ▶ Two managed portfolios dinner passes
- ▶ Logo on website, print, email, and direct mail marketing
- ▶ One-time use pre- and post-conference attendee list

## Sponsorship

### **Lead** (two available sponsorships)

**\$40,000**

There are two Lead sponsorships available for the 2014 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 table top display space, four exhibitor conference registrations, five advisor guest passes, a pass to our managed portfolios dinner, and logo placement in print ads, emails, direct mail marketing, and on the 2014 Morningstar ETF Conference website.

- ▶ 6' × 2' table
- ▶ Cocktail reception sponsor
- ▶ Pen (1) or notebook (1)
- ▶ Four exhibitor conference registrations
- ▶ Five advisor guest conference passes
- ▶ One managed portfolios dinner pass
- ▶ Logo on website, print, email, and direct mail marketing
- ▶ One-time use pre- and post-conference attendee list

### **Major** (five available)

**\$30,000**

Five Major sponsorships are available for the 2014 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 table top display space, a dinner pass to our invite-only managed portfolios dinner, three exhibitor conference registrations, five advisor guest passes, and logo placement in print ads, emails, direct mail marketing, and on the 2014 Morningstar ETF Conference website.

- ▶ 6' × 2' table
- ▶ Bag insert
- ▶ Breakfast sponsor (2) or break sponsor (3)
- ▶ Three exhibitor conference registrations
- ▶ Five advisor guest conference passes
- ▶ One managed portfolios dinner pass
- ▶ Logo on website, print, email, and direct mail marketing
- ▶ One-time use pre- and post-conference attendee list

### **Associate** (limited availability)

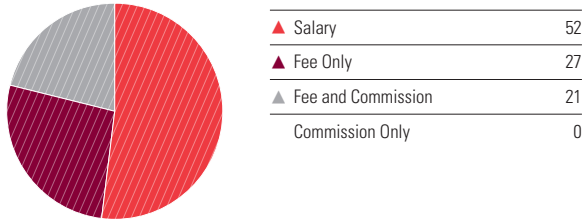
**\$18,000**

Associate sponsorships are available for those who want to exhibit at the 2014 Morningstar ETF Conference and feature their names and logos in conference marketing. Associate Sponsors will get table top display space with two exhibitor conference registrations, two advisor guest passes, and placement in print ads, emails, direct mail marketing, and on the 2014 Morningstar ETF Conference website.

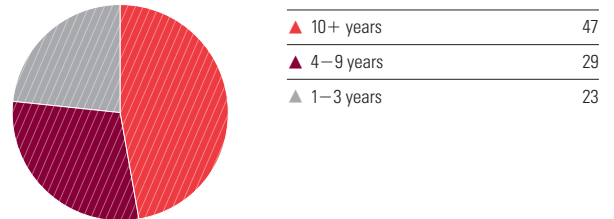
- ▶ 6' × 2' table
- ▶ Two exhibitor conference registrations
- ▶ Two advisor guest passes
- ▶ Logo on website, email, and direct mail marketing

# Morningstar ETF Conference Attendee Profile

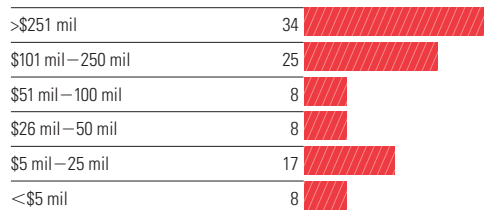
## Method of Compensation (%)



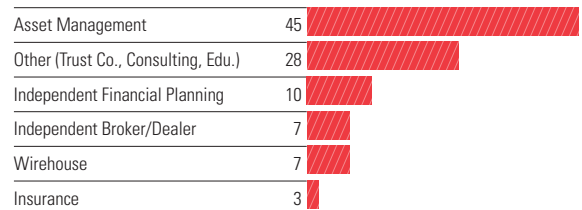
## Years as a Financial Planner (%)



## Assets Under Management (%)



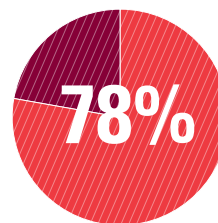
## Firm Specialties (%)



## Exhibit Area



of attendees visited the exhibit area.



of attendees visited sponsors to learn about new products and services.

Source: 2013 Morningstar ETF Conference Attendee Survey