

**Morningstar®
Investment Conference**

**Chicago
2018**

Sponsorship Kit



Morningstar® Investment Conference

Chicago 2018

**McCormick Place
Chicago
June 11–13, 2018**

The Morningstar® Investment Conference brings together the nation's top investment experts to discuss industry trends, investment research, and the market environment. Conference attendees are a highly qualified audience of investment advisors and financial planners looking for solutions to help manage their businesses.

In 2017, 2,000+ financial professionals attended the Morningstar Investment Conference. The exhibit hall featured 175 vendors and sponsors, ranging from fund companies and investment managers to financial publishers and technology firms.

This event is highly recommended for:

- ▶ Investment companies that want to expand advisor relationships and market their products
- ▶ Software companies looking to reach an advisor audience
- ▶ Broker-dealers concerned with recruitment and seeking networking opportunities
- ▶ Any organization seeking interaction with industry leaders and top performers to exchange ideas, compare notes, or share challenges



2017 Conference Statistics

Exhibiting at the Morningstar® Investment 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 2017 conference.

Why Attendees Choose Our Conference %

Morningstar speakers and content	68
Generate investment ideas from the latest research	65
Non-Morningstar speakers and content	57
Industry networking	45



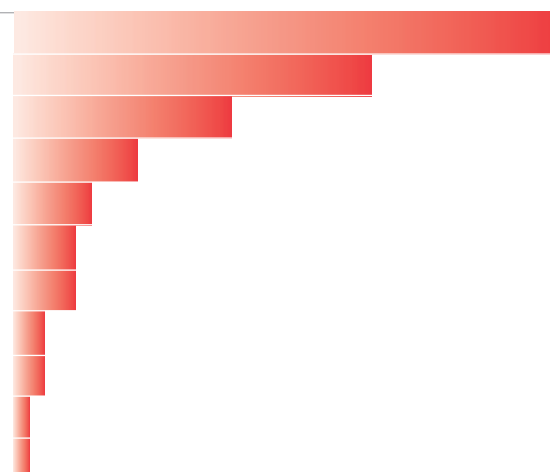
What Attendees Value Most in the Exhibit Hall

Exhibitor booths	1
Food stations	2
Coffee bar	3
Presentation theaters	4
Recharge lounge	5

Source: 2017 Morningstar Investment Conference Attendee Survey

Attendees by Firm Type %

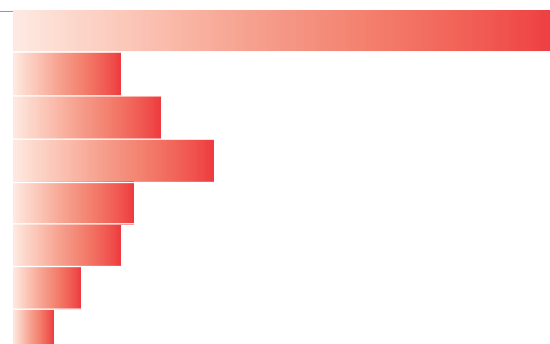
Registered Investment Advisor	35
Asset Management	23
Other*	14
Brokerage Firm	8
Mutual Fund Company	5
Investment Consulting	4
Bank	4
Family Office	2
Insurance Company	2
Trust Company	1
Wirehouse	1



*Other includes portfolio managers, research analyst/due diligence, accounting, legal firms, and compliance.

Assets Under Management %

>\$1 billion	41
\$501 million–1 billion	8
\$251–500 million	11
\$101–250 million	15
\$51–100 million	9
\$26–50 million	8
\$5–25 million	5
<\$5 million	3



Source: 2017 Morningstar Investment Conference Attendee Registration Data

Sponsorship

Principal

\$70,000

Exclusive sponsorship

As the principal sponsor of the 2018 Morningstar® Investment Conference, your company has the opportunity to be a key part of the attendee experience throughout the conference. Your sponsorship gives you prime placement in the exhibit hall, a double-sized booth, and extra passes for your exhibiting staff.

As the principal sponsor, your company will reach all attendees using laptops and mobile devices as the mobile app and Wi-Fi sponsor. Your sponsorship includes one banner ad in the mobile app, one push notification to mobile app users during the conference, and the option to customize the Wi-Fi password. Your logo will be included on mobile app promotions and signage.

The principal sponsorship includes the opening night reception on Wednesday. The reception features premium

bar and food offerings. Customization options include selecting a customized beverage for the bar at an additional charge, as well as the opportunity to supply branded napkins and aprons for catering staff.

In addition to your on-site presence, advertising exposure includes logo placement in all preconference marketing materials, including email and direct mail, and on the conference website. You will receive premium full-page ad placement in the 2018 *Postconference Supplement*, mailed after the conference in July, and polybagged with the August/September issue of *Morningstar* magazine.

Lead

\$55,000

2 available

As one of two lead sponsors of the 2018 Morningstar Investment Conference, your company will be visible to attendees on several different fronts.

All attendees will receive conference materials upon registration. As a lead sponsor, you have the option to provide a branded pen or notebook for all attendees. In addition, each lead sponsor's branding will be front and center during either the afternoon refreshment break on Wednesday afternoon or the networking reception on Thursday evening.

As a lead sponsor you will also receive prime booth placement in the exhibit hall, along with either a branded hotel keycard or a promotional in-room drop. Advertising exposure includes logo placement in all preconference marketing materials, including email and direct mail, and on the conference website. You will receive full-page ad placement in the 2018 *Postconference Supplement*, mailed after the conference in July, and polybagged with the August/September issue of *Morningstar* magazine.

Major

\$45,000

6 available

As one of six major sponsors, your company will be the sole sponsor during a breakfast, the research showcase lunch, or a refreshment break during the 2018 Morningstar Investment Conference. You will

receive full-page ad placement in the 2018 *Postconference Supplement*, mailed after the conference in July, and polybagged with the August/September issue of *Morningstar* magazine.

Associate

\$20,000

Limited availability

The associate sponsorship will give your company an advertising edge on other exhibitors with full-page ad placement in the June/July issue of *Morningstar* magazine.

Sponsorship Benefits Overview

Sponsorship gives you the opportunity to have your logo included in 2018 Morningstar® Investment Conference marketing, including the website, brochure, direct mail, and promotional emails.

Register now to ensure maximum exposure.

		Principal	Lead	Major	Associate
Exhibit Hall	Double booth with four exhibitors	✓	✓	✓	
	Single booth with two exhibitors				✓
	Additional exhibitors	⑥	④	③	②
Branding	Mobile app (including banner ad and push notification)	✓			
	Opening night reception	✓			
	Wi-Fi	✓			
	Afternoon refreshment break or networking reception		✓		
	Pen or notebook		✓		
	Hotel keycard or hotel in-room drop		✓		
	Breakfast, preconference lunch, or break			✓	
Advertising	Full-page ad, <i>Postconference Supplement</i>	✓	✓	✓	
	Full-page ad, <i>Morningstar</i> magazine				✓
	One-time use of pre and postconference opt-in attendee lists	✓	✓	✓	✓
2018 Package Price		\$70,000	\$55,000	\$45,000	\$20,000

Additional Sponsorship Opportunities

Coffee Bar & Lounge \$65,000 1 available	The coffee bar is a 40x40 area in the exhibit hall where coffee and espresso beverages are served throughout the conference. Promotion of the coffee bar includes signage and one push notification to attendees using the	mobile app. This package includes a 10x10 exhibit space and two exhibitor passes. Sponsors may provide two branded pull-up signs, napkins, and coffee sleeves.
Game Lounge \$45,000 1 available	The Game Lounge is a 40x40 area in the exhibit hall where attendees can relax as well as play virtual golf and classic arcade games. This package includes a separate	10x10 exhibit space and two exhibitor passes. Sponsors may provide two branded pull-up signs for the lounge.
Recharge Lounge \$45,000 1 available	The recharge lounge is a 40x40 area in the exhibit hall where attendees can recharge their mobile devices. Snacks and fruit-infused water are served in the lounge throughout the conference. Promotion of the recharge lounge includes signage and one push	notification to attendees using the mobile app. This package includes a 10x10 exhibit space and two exhibitor passes. Sponsors may provide two branded pull-up signs for the lounge.
Presentation Stage \$25,000 Limited availability	Speak to captive attendees by reserving the presentation stage in the exhibit hall for a 30-minute presentation during breaks. Presentation stage sponsors will be able to	scan attendee badges to track session attendance. These sessions will be filmed and footage will be provided to the sponsor company for their own usage.
Professional Photo Booth \$20,000 1 available	Connect with attendees when they stop by the professional photo booth sponsored by your organization. The photo booth can be located next to your booth. A photographer will be available throughout the conference to take	professional headshots that attendees can use on digital and social media platforms. Sponsors will receive a list of participants to communicate with them after the conference.
Shoe Shine \$10,000 1 available	Expand your presence by offering attendees a shoe shine in the exhibit hall, either at a separate station or next to your booth.	
Hotel Room Drop \$6,000 3 available	Provide a branded item or materials to conference attendees staying at the Hyatt McCormick Place.	
Bag Inserts \$5,000 5 available	Add an insert to the conference bag and get your message across to every attendee.	
Digital Opportunities	Expand your sponsorship of the conference to an online audience of financial advisors. Morningstar.com® will run featured coverage during the Morningstar® Investment Conference. Post-conference, the Best of the Morningstar	Investment Conference Online features the sessions from the conference that financial advisors can view for six weeks. Request pricing and sponsorship options from your relationship manager.

Additional Information

Exhibitor Booths

Single (10' x 10', two exhibitors included)—**\$12,000**

Double (10' x 20', four exhibitors included)—**\$18,000**

Attendee Registration Fees

Additional exhibitor—**\$900**

Attendee—**\$900**

Early bird registration (by March 16, 2018)—**\$730**

Attendee Lists

All sponsors and exhibitors will receive one-time use pre and postconference lists of opt-in attendees who agree to provide their contact information.

Cancellations

Booth registration and sponsorship fees are 100% refundable if Morningstar receives a written cancellation notice by March 16, 2018. No refunds will be given after March 16, 2018.

Contact

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