

**Morningstar®
Investment Conference**

**Chicago
2017**

Sponsorship Kit



Morningstar® Investment Conference

Chicago 2017

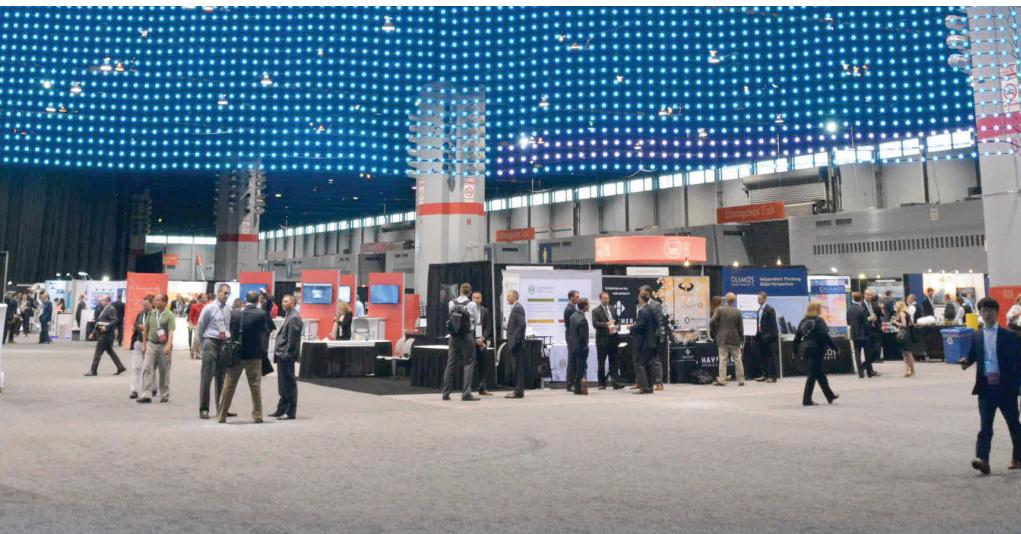
**McCormick Place
Chicago
April 26–28, 2017**

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 2016, 2,000+ financial professionals attended the Morningstar Investment Conference. The exhibit hall featured 185 vendors and sponsors, ranging from fund companies and investment managers to financial publishers and software firms.

This event is highly recommended for:

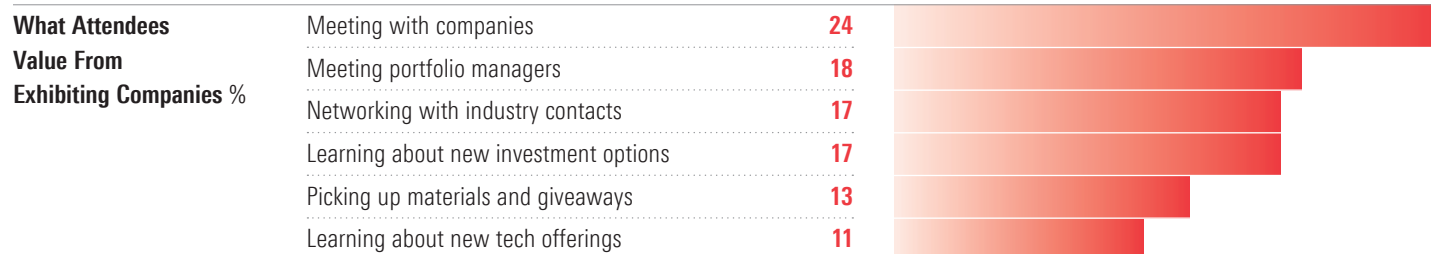
- ▶ Investment companies that want to expand advisor relationships and market their products
- ▶ Software companies looking to reach an advisor audience
- ▶ Broker-dealers concerned with recruitment and seeking networking opportunities
- ▶ Any organization seeking interaction with industry leaders and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



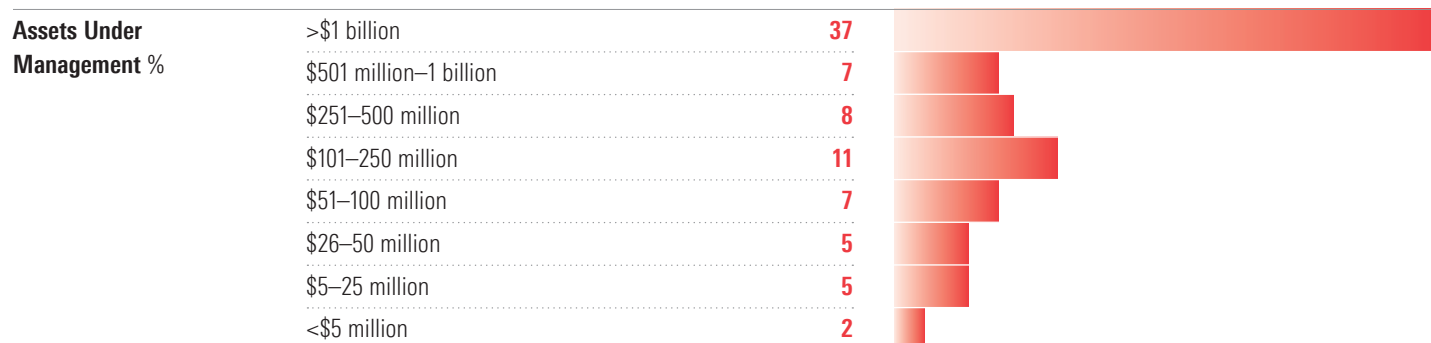
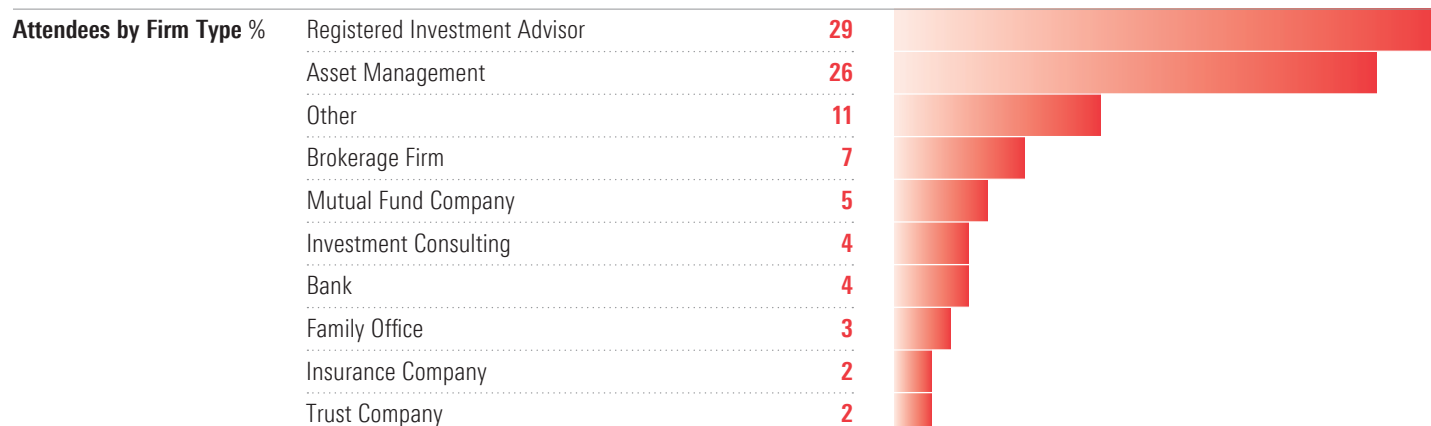
2016 Conference Statistics

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 2016 conference.



Source: 2016 Morningstar Investment Conference Attendee Survey



Source: 2016 Morningstar Investment Conference Attendee Registration Data

Sponsorship

Principal

\$70,000

Exclusive sponsorship

As the principal sponsor of the 2017 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 at 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 both editions of the 2017 *Morningstar Investment Conference Daily*, distributed to conference attendees at key locations throughout the exhibit hall. You will also get a full-page ad in the 2017 *Postconference Supplement*, mailed after the conference.

Lead

\$55,000

2 available

As one of two lead sponsors of the 2017 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, your logo will be featured prominently on either the pen or notebook they will receive. 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 premium full-page ad placement in both editions of the 2017 *Morningstar Investment Conference Daily*, distributed to conference attendees at key locations throughout the exhibit hall. You will also get a full-page ad in the 2017 *Postconference Supplement*, mailed after the conference.

Major

\$45,000

6 available

As one of six major sponsors, your company will be the sole sponsor during a breakfast, the preconference workshop lunch, or a refreshment break during the 2017 Morningstar Investment Conference. You will receive premium full-page ad placement in both editions

of the 2017 *Morningstar Investment Conference Daily*, distributed to conference attendees at key locations throughout the exhibit hall. You will also get a full-page ad in the 2017 *Postconference Supplement*, mailed after the conference.

Associate

\$20,000

17 available

The associate sponsorship will give your company an advertising edge on other exhibitors with full-page ad placement in the 2017 *Morningstar Investment Conference Daily* or *Morningstar* magazine.

Sponsorship Benefits Overview

Sponsorship gives you the opportunity to have your logo included in 2017 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 Investment Conference Daily</i> | ✓ | ✓ | ✓ | ✓* |
| | One-time use of pre and postconference opt-in attendee lists | ✓ | ✓ | ✓ | ✓ |
| 2017 Package Price | | \$70,000 | \$55,000 | \$45,000 | \$20,000 |

*Associate level sponsors have the option of a full-page ad in the *Morningstar Investment Conference Daily* or *Morningstar* magazine, not both.

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. |
| Recharge Lounge \$65,000 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 \$15,000 3 available | Speak to captive attendees by reserving the presentation stage on the exhibit hall floor for a 30-minute presentation. | |
| 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 February 24, 2017)—**\$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.

Customized and Bundled Sponsorship Packages

Packages are available for the 2017 Morningstar Investment Conference and the 2017 Morningstar ETF Conference. All sponsorship packages are subject to availability.

Cancellations

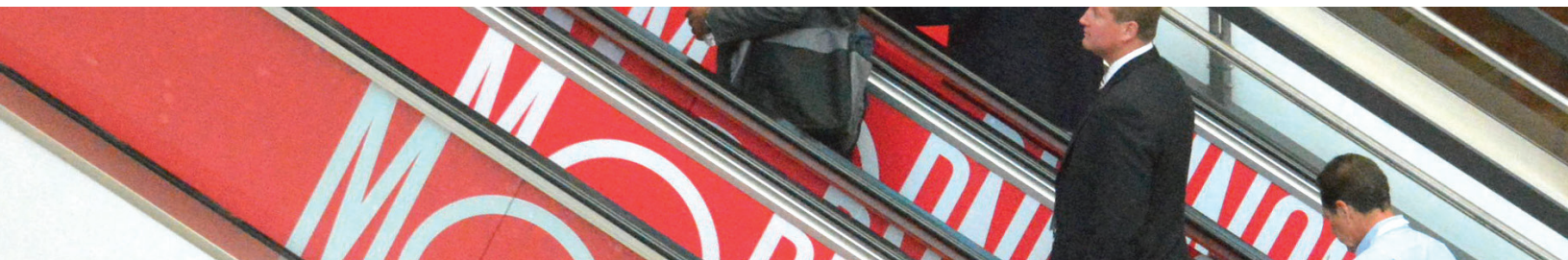
Booth registration and sponsorship fees are 100% refundable if Morningstar receives a written cancellation notice by January 20, 2017. No refunds will be given after January 20, 2017.

Contact

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