



Support our Mission for Investor Education Through Collaboration, Contribution & Commitment to our TII Community!
The Winter Investment Institute Forum
February 24-25, 2020
Charlotte, North Carolina
(Open to current members & non-members)

The Investment Institute (TII) offers **three different contribution levels designed to fit your budget and to help us provide investor education to Our Community.** To brand and partner alongside TII at our Winter Forum, please review the below information or feel free to email andrea.szigethy@theinvestmentinstitute.org or call Andrea directly at 919.619.3265. We typically only take a limited number of supporters (no more than 6 to 8) for our Winter Forum. **Thank You!**

Level I: Featured Winter Forum 2020 Lead Partnering Supporter – \$30,000 – ONE SPOT AVAILABLE!

This **Lead/Partnering Supporter** level will brand alongside TII at our **2020 Winter Forum on February 24-25, 2020 in Charlotte, NC.**

Passes

- **(5) Five Complimentary Company Passes to attend The Winter Forum 2020.** *One of the 6 passes will be designated for your firm's agreed-upon speaker.*
- **(5) Five Complimentary Guest Passes for Your Firm's Investor Clients to attend The Winter Forum 2020.** *These passes are for allocators only and cannot be used for anyone who may offer products and services to our community. All guests must be approved in advance by The Investment Institute.*
- **(2) Two Spots for Your Company to attend the Investors-Only Session at The Winter Forum 2020.** *One pass must be used by your CEO, CIO or PM.*

Joining Distinguished Faculty

- Includes your firm's CEO, CIO or Senior Portfolio Manager's **30-minute stand-alone educational presentation at The Winter Forum 2020.** The educational topic and presenter will be mutually agreed upon by your firm and The Investment Institute's Editorial Committee. We will work with you to develop a good fit built around our conference themes. *Absolutely no selling from the podium allowed.*

Early Access to Participant Listing

- A **Confidential List of Participants will be given to your firm Five (5) Business Days prior to The Fall Forum 2019** with an updated version provided on the day the program takes place. This list will include **Name, Title, Company Name, State and Email Address.** This is an opportunity for your firm to **connect and strengthen relationships with investors and managers** across the country.

Branding & Affiliating alongside TII & Faculty

- **Logo & Brand Recognition on all of TII's Email Marketing, Onsite Signage, Website & Conference App.** Your branding will be on all TII marketing materials prior to and at the event in addition to appearing on special branding and signage on screens, lunch tables, welcome dinner tables, etc.
- **Display Your Firm's Educational White Papers, Thought Pieces, a Company Ad and Marketing Materials on Conference App** as well as on our marketing table at The Winter Forum 2020. *(Hard copies of marketing materials or any giveaways that a supporter wishes to send must be provided by the supporter firm and shipped or dropped off at the conference venue.)*
- Special **Thank-You Announcements** several times from the podium & through email.

Discounted 2020 TII Annual Membership Available

- As an added benefit to sponsoring our Winter Forum 2020 in Charlotte, we are offering our sponsors a 30% discount off of our regular membership annual fee towards a 2020 Investment Institute Membership for 2020. If this membership is purchased, it will include one or two access passes for your firm to attend both of our Fall & Spring Forums in 2020 depending upon the level you choose to join at. Our Spring Forum will take place on May 18-19, 2020 at The Carolina Inn in Chapel Hill, NC and our Fall Forum 2020 dates and venue are TBD.

Level II: Collaborating Supporter Winter Forum 2020 – \$20,000 - TWO SPOTS STILL AVAILABLE!

This **Collaborating Supporter** level will brand alongside TII at our **2020 Winter Forum on February 24-25, 2020 in Charlotte, NC.**

Passes

- **(4) Four Complimentary Company Passes to attend The Winter Forum 2020.** *One of the 4 passes will be designated for your firm's agreed-upon panelist.*
- **(4) Four Complimentary Guest Passes for Your Firm's Investor Clients to attend The Winter Forum 2020.** *These passes are for allocators only and cannot be used for anyone who may offer products and services to our community. All guests must be approved in advance by The Investment Institute.*
- **(1) One Spot for Your Company to attend the Investors-Only Session at The Winter Forum 2020.** *The pass must be used by your CEO, CIO or PM.*

Joining Distinguished Faculty

- Includes your firm's CEO, CIO or Senior Portfolio Manager's **spot as either a moderator or panelist on a panel discussion at The Winter Forum 2020.** The educational topic will be mutually agreed upon by your firm and The Investment Institute's Editorial Committee. We will work with you to develop a good fit built around our conference themes. *Absolutely no selling from the podium allowed.*

Early Access to Participant Listing

- A **Confidential List of Participants will be given to your firm Four (4) Business Days prior to The Winter Forum 2020** with an updated version provided on the day the program takes place. This list will include **Name, Title, Company Name and State**. This is an opportunity for your firm to **connect and strengthen relationships with investors and managers** across the country.
-

Branding & Affiliating alongside TII & Faculty

- **Logo & Brand Recognition on all of TII's Email Marketing, Onsite Signage, Website & Conference App.** Your branding will be on all TII marketing materials prior to and at the event in addition to appearing on special branding and signage on screens, lunch tables, welcome dinner tables, etc.
 - **Display Your Firm's Educational White Papers, Thought Pieces, a Company Ad and Marketing Materials on Conference App** as well as on our marketing table at The Winter Forum 2020. (*Hard copies of marketing materials or any giveaways that a supporter wishes to send must be provided by the supporter firm and shipped or dropped off at the conference venue.*)
 - Special **Thank-You Announcements** several times from the podium & through email.
-

Discounted 2020 TII Annual Membership Available

- As an added benefit to sponsoring our Winter Forum 2020 in Charlotte, we are offering our sponsors a 30% discount off of our regular membership annual fee towards a 2020 Investment Institute Membership for 2020. If this membership is purchased, it will include one or two access passes for your firm to attend both of our Fall & Spring Forums in 2020 depending upon the level you choose to join at. Our Spring Forum will take place on May 18-19, 2020 at The Carolina Inn in Chapel Hill, NC and our Fall Forum 2020 dates and venue are TBD.
-

Level III: Contributing Supporter Winter Forum 2020 – \$10,000 - FIVE SPOTS STILL AVAILABLE!

This **Contributing Supporter** level will brand alongside TII at our **2020 Winter Forum on February 24-25, 2020 in Charlotte, NC.**

Passes

- **(3) Three Complimentary Company Passes to attend The Winter Forum 2020.**
 - **(3) Three Complimentary Guest Passes for Your Firm's Investor Clients to attend The Winter Forum 2020.** *These passes are for allocators only and cannot be used for anyone who may offer products and services to our community. All guests must be approved in advance by The Investment Institute.*
 - **(1) One Spot for Your Company to attend the Investors-Only Session at The Winter Forum 2020.** *The pass must be used by your CEO, CIO or PM.*
-

Early Access to Participant Listing

- A **Confidential List of Participants will be given to your firm Three (3) Business Days prior to The Winter Forum 2020** with an updated version provided on the day the program takes place. This list will include **Name, Title, Company Name and State**. This is an opportunity for your firm to **connect and strengthen relationships with investors and managers** across the country.
-

Branding alongside TII

- **Logo & Brand Recognition on all of TII's Email Marketing, Onsite Signage, Website & Conference App.** Your branding will be on all TII marketing materials prior to and at the event in addition to appearing on special branding and signage on screens, lunch tables, welcome dinner tables, etc.
 - **Display Your Firm's Educational White Papers, Thought Pieces, a Company Ad and Marketing Materials on Conference App** as well as on our marketing table at The Winter Forum 2020. (*Hard copies of marketing materials or any giveaways that a supporter wishes to send must be provided by the supporter firm and shipped or dropped off at the conference venue.*)
 - Special **Thank-You Announcements** several times from the podium & through email.
-

Discounted 2020 TII Annual Membership Available

- As an added benefit to sponsoring our Winter Forum 2020 in Charlotte, we are offering our sponsors a 20% discount off of our regular membership annual fee towards a 2020 Investment Institute Membership for 2020. If this membership is purchased, it will include one or two access passes for your firm to attend both of our Fall & Spring Forums in 2020 depending upon the level you choose to join at. Our Spring Forum will take place on May 18-19, 2020 at The Carolina Inn in Chapel Hill, NC and our Fall Forum 2020 dates and venue are TBD.
-



Contact Us:

Andrea Szigethy
Founder & CEO

The Investment Institute, LLC
919.619.3265

andrea.szigethy@theinvestmentinstitute.org

Donna Holly
President

The Investment Institute, LLC
646.554.8800

donna.holly@theinvestmentinstitute.org

To join our community, visit our website at www.TheInvestmentInstitute.org
