



## Support our Mission for Investor Education Through Collaboration, Contribution & Commitment to our TII Community!

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, please review the below information or feel free to email [andrea.szigethy@theinvestmentinstitute.org](mailto:andrea.szigethy@theinvestmentinstitute.org) or call Andrea directly at 919.619.3265. We typically only take a limited number of supporters (no more than 10 to 12) for each forum. **Partnering firms will receive their full year of membership dues built into the price.** Thank you!

### **Level I: Featured Fall Forum 2019 Lead Partnering Supporter – \$35,000 – SOLD OUT!**

This Lead/Partnering Supporter level will brand alongside TII at our **2019 Fall Forum on October 24-25, 2019 at The Umstead Hotel, Cary, NC.**

#### Passes

- **(6) Six Complimentary Company Passes to attend The Fall Forum 2019.** *One of the 6 passes will be designated for your firm's agreed-upon speaker.*
- **(6) Six Complimentary Guest Passes for Your Firm's Investor Clients to attend The Fall Forum 2019.** *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 Fall Forum 2019.** *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 Fall Forum 2019.** 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 Eight (8) 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. ***\*This is the only level of sponsorship that includes email addresses.\****

#### 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 Fall Forum 2019. *(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.

#### Your Annual Membership is Included in Pricing

- **Your Firm's Annual Membership Dues are paid in full as part of this Fall Forum 2019 Supporter Agreement.** You will also receive all of the regular member benefits including **two passes** to attend the **2020 Spring Forum (May 18-19, 2020 in Chapel Hill, NC at The Carolina Inn).** Please note that your firm **will not be** represented as a sponsor at The Spring Forum 2020 program and will not have a speaker at the Spring Forum 2020 Forum.

### **Level II: Collaborating Supporter Fall Forum 2019 – \$25,000 – SOLD OUT!**

This Collaborating Supporter level will brand alongside TII at our **2019 Fall Forum on October 24-25, 2019 at The Umstead Hotel, Cary, NC.**

#### Passes

- **(4) Four Complimentary Company Passes to attend The Fall Forum 2019.** *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 Fall Forum 2019.** *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 Fall Forum 2019.** *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 Fall Forum 2019.** 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.*

## Level II: Collaborating Supporter – Continued

### 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 and State**. This is an opportunity for your firm to **connect and strengthen relationships with investors and managers** across the country.

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### 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 Fall Forum 2019. (*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.

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### Your Annual Membership is Included in Pricing

- Your Firm's **Annual Membership Dues** are paid in full as part of this **Fall Forum 2019 Supporter Agreement**. You will also receive all of the regular member benefits including **two passes** to attend the **2020 Spring Forum (May 18-19, 2020 in Chapel Hill, NC at The Carolina Inn)**. Please note that your firm **will not be** represented as a sponsor at The Spring Forum 2020 program and will not have a speaker at the Spring Forum 2020 Forum.

## Level III: Contributing Supporter Fall Forum 2019 – \$15,000 **FOUR SPOTS STILL AVAILABLE!**

This Contributing Supporter level will brand alongside TII at our **2019 Fall Forum on October 24-25, 2019 at The Umstead Hotel, Cary, NC**.

### Passes

- **(3) Three Complimentary Company Passes** to attend The Fall Forum 2019.
- **(3) Three Complimentary Guest Passes for Your Firm's Investor Clients** to attend The Fall Forum 2019. *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 Fall Forum 2019. *The pass must be used by your CEO, CIO or PM.*

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### Early Access to Participant Listing

- A **Confidential List of Participants** will be given to your firm **Three (3) 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 and State**. This is an opportunity for your firm to **connect and strengthen relationships with investors and managers** across the country.

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### 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 Fall Forum 2019. (*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.*)
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### Your Annual Membership is Included in Pricing

- Your Firm's **Annual Membership Dues** are paid in full as part of this **Fall Forum 2019 Supporter Agreement**. You will also receive all of the regular member benefits including **two passes** to attend the **2020 Spring Forum (May 18-19, 2020 in Chapel Hill, NC at The Carolina Inn)**. Please note that your firm **will not be** represented as a sponsor at The Spring Forum 2020 program and will not have a speaker at the Spring Forum 2020 Forum.



#### Contact Us:

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**To join our community, visit our website at [www.TheInvestmentInstitute.org](http://www.TheInvestmentInstitute.org)**