

Morningstar Investment Conference

2021 Sponsor Kit

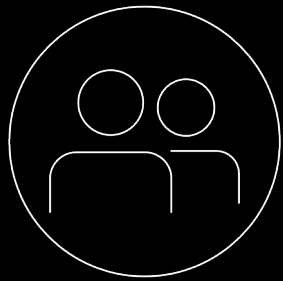
US

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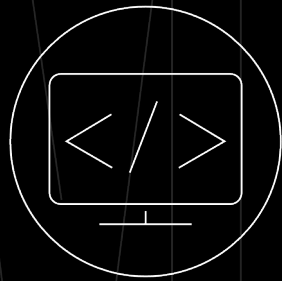


The **Morningstar Investment Conference** brings together top investment experts to discuss industry trends, investment research, and the market environment. Conference attendees are a highly qualified audience of investment advisors and financial planners looking for solutions to help manage their businesses. In 2020 we launched a new all-digital experience that gave investing professionals everywhere the research, insights, and analysis they could use to chart a course forward and empower investor success like never before.

The **Morningstar Investment Conference** is highly recommended for:



Investment companies that want to expand advisor relationships and market their products



Software and fintech companies looking to reach an advisor audience



Broker/dealers focused on recruitment and networking opportunities



Organizations that want to interact with industry leaders and top performers to exchange ideas, compare notes, or share challenges

Hybrid event experience

Sept. 22–24, 2021

On-demand sessions through

Oct. 24, 2021





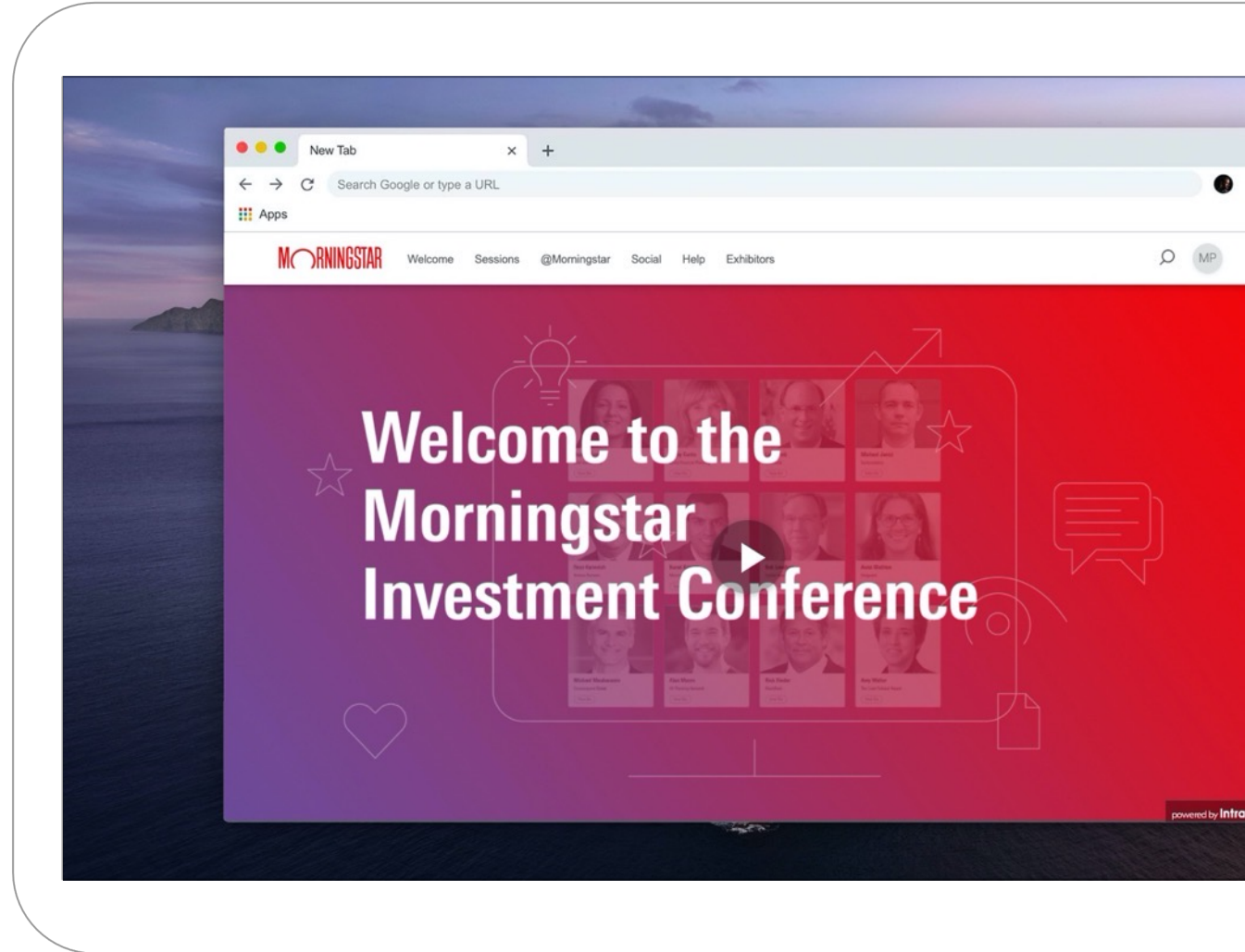
The **Morningstar Investment Conference** is one of the most effective ways to reach the people who make decisions about buying your products and services. Conference sponsorships maximize your firm's visibility to a captive audience of experienced financial professionals, as evidenced by these statistics from our 2020 conference.



Over 3,000 people participated in our all-digital U.S. conference, which featured **22 sessions** and **61 speakers**.

Over 1,300 of those attendees spent more than 10 hours in the live event on Sept. 16–17.

We chose **Intrado** for our digital events because it's a platform designed to benefit exhibitors. It's **flexible, scalable**, and has effective **networking** features for attendees.



New Tab

Search Google or type a URL

MORNINGSTAR Welcome Sessions @Morningstar Exhibitors Social Help

Watch pre-recorded panels and live sessions you might have missed.

Filter sessions by type, track, or country with the buttons below.

ALL **Keynote** Active Investing Passive Investing Future of Investment Rethinking Retirement U.S. South Africa Australia

India Spain Italy U.K.

My Agenda CLEAR MORE

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Morningstar Investment Conference 2020 #MICDigital #MICUS #MCSA #MCAU #MICES #MICIN #MICIT #MICUK #MICFR

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MORNINGSTAR Welcome Sessions @Morningstar Social Help Exhibitors

Meet our #MICUS exhibitors.

It's like an exhibit hall, but with less walking. Meet managers and explore a wealth of content from conference sponsors.

<p>PRINCIPAL SPONSOR</p> <p>PGIM Investments</p> <p>VIEW MORE</p>	<p>VIRTUAL REALITY SPONSOR</p> <p>Mesmerise</p> <p>VIEW MORE</p>	<p>SOCIAL/DIGITAL HUB SPONSOR</p> <p>Social/Digital Hub powered by Impact Communications, Inc.</p> <p>VIEW MORE</p>	<p>LEAD SPONSOR</p> <p>Alger</p> <p>VIEW MORE</p>
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PRINCIPAL SPONSOR

PGIM Investments

At PGIM Investments, we help meet the financial needs of investors by offering investment strategies across the global markets. We're part of PGIM, the global investment management business of

Staff Guests

Currently there are no users online.

PGIM INVESTMENTS

PGIM INVESTMENTS

Welcome

Videos

PGIM Investments Documents

We also teamed up with Mesmerise Global to create our first-ever virtual-reality conference for attendees who wanted to experience the cutting edge of technology.



Mesmerise



A man with grey hair, wearing a dark suit jacket over a light blue shirt, is speaking and gesturing with his hands. He is positioned in front of a large wooden bookshelf filled with books. The background is slightly blurred, focusing attention on the speaker.

**We asked our attendees why they chose our conference.
Here are the top four responses:**

1

**Morningstar speakers
and content**

2

**Generate investment ideas
from the latest research**

3

**Non-Morningstar
speakers and content**

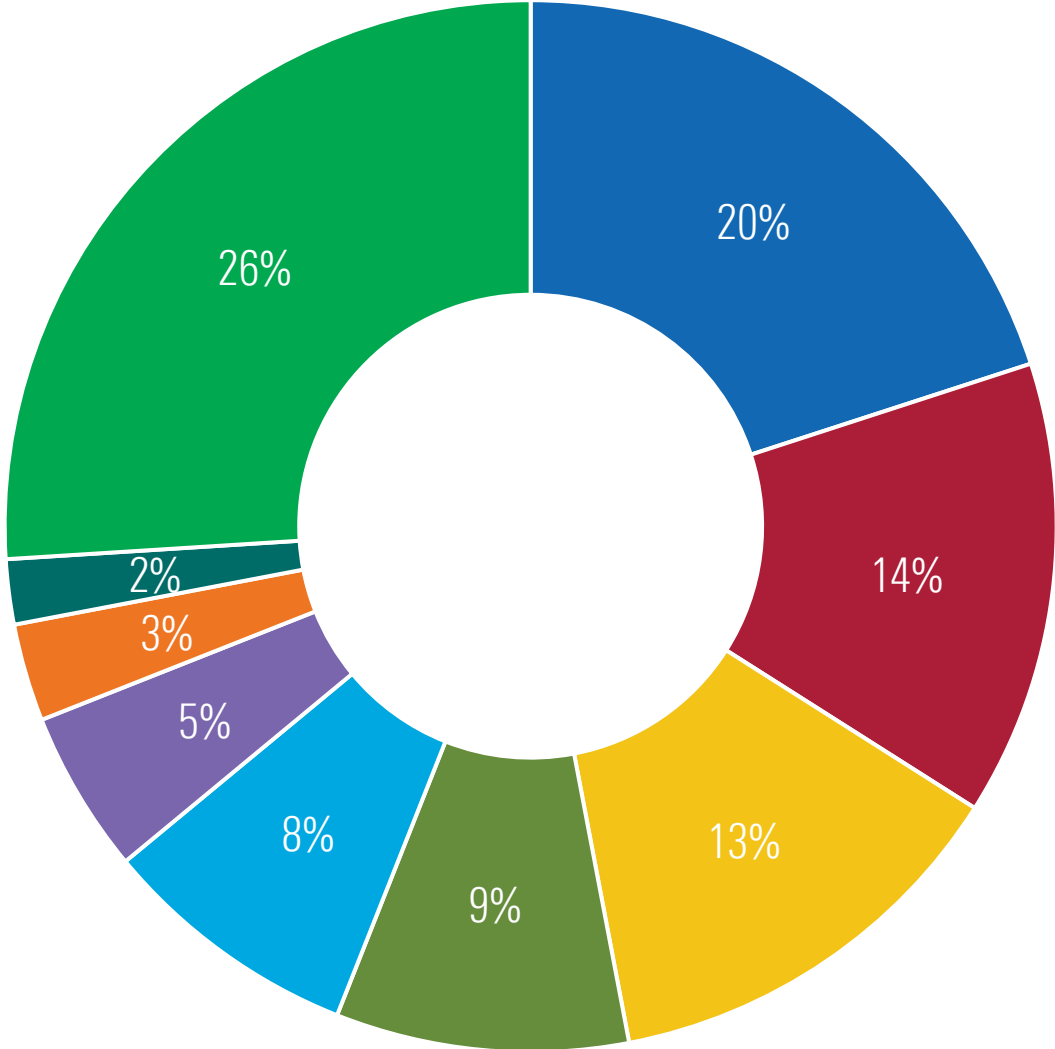
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Industry networking

Conference Statistics

Attendees by Firm Type

	%
Asset Management Firm	20
Registered Investment Advisory Firm (RIA)	14
Broker / Dealer	13
Consulting Firm	9
Individual Investor	8
Private Bank / Trust Company	5
Insurance Firm	3
Academic Institution / Library	2
Other*	26



* Includes: Clearing Firm/Custodial Firm, Employer/Plan Sponsor, Exchange, Government/Regulatory Institution, Hedge Fund, Index Provider, Media/Publication, Pension/Foundation/Endowment, Private Equity Firm, Retirement Plan Provider, Sovereign Wealth Fund, Trade Association, Wirehouse, and others.

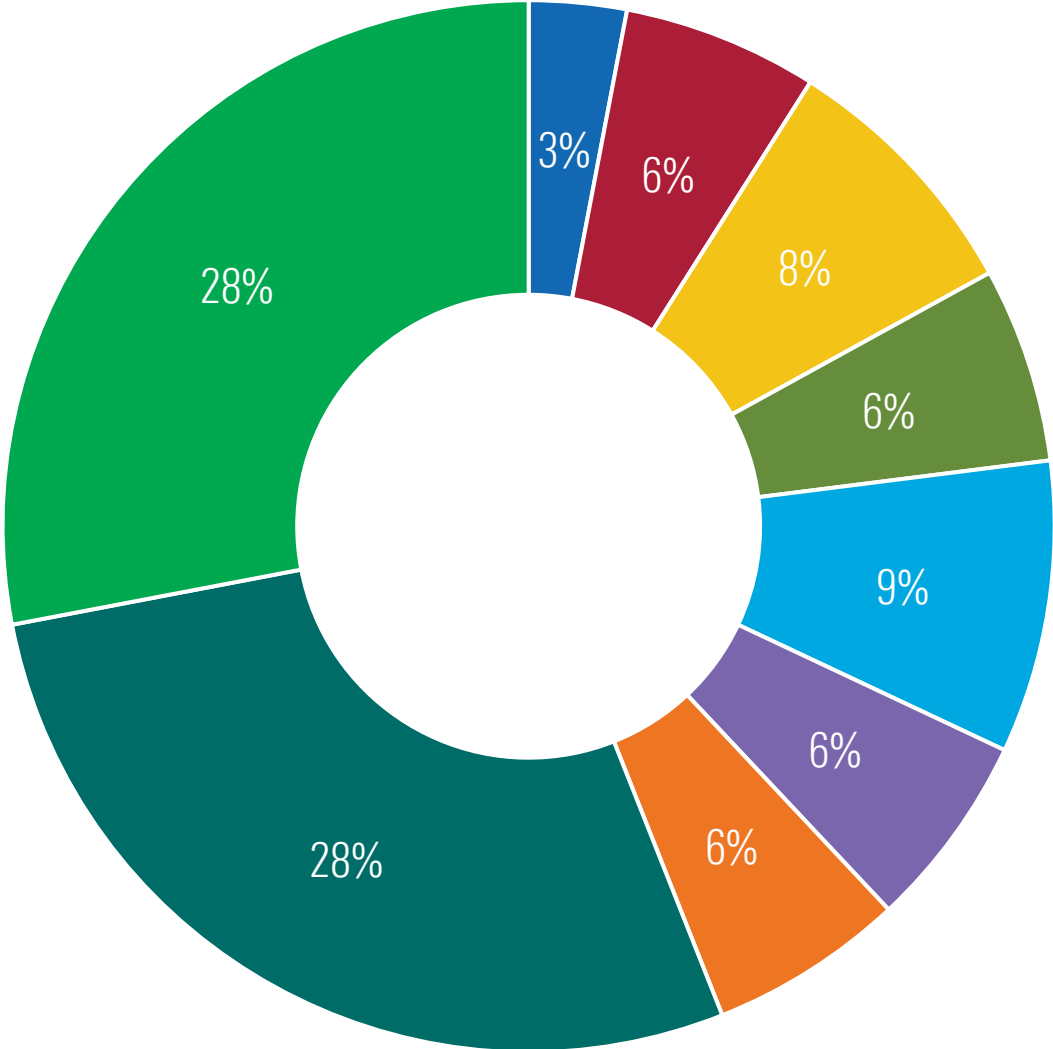
Source: 2020 Morningstar Investment Conference Online CVENT attendee registration data.

Conference Statistics

Assets Under Management

- \$0–5 million
- \$5–25 million
- \$25–50 million
- \$50–100 million
- \$100–250 million
- \$250–500 million
- \$500 million–1 billion
- More than \$1 billion
- I do not manage assets

%
3
6
8
6
9
6
6
28
28



Source: 2020 Morningstar Investment Conference Online CVENT attendee registration data.

Digital Package Benefits Overview

	Principal \$39,000 1 available	Lead \$27,000 8 available	Associate \$15,000 Limited
Virtual booth with 10-minute welcome video, additional video uploads, staff listing with one-on-one video chat, downloaded white papers, link to external website, and survey question.	★	★	★
Ability to upload additional videos	5	3	1
Content downloads (i.e., white papers)	8	6	2
Individual conference registrations	20	20	10
Live content 9/22–9/24	★	★	★
Sponsor sessions available on demand 9/22–10/24	★	★	★
Sponsor space in digital exhibit hall 9/22–10/24	★	★	★
Logo on conference promotional website	★	★	★
Logo in conference marketing emails to attendees	★	★	★
List of your booth visitors with contact information	★	★	★

Digital Package Benefits Overview

	Principal \$39,000 1 available	Lead \$27,000 8 available	Associate \$15,000 Limited
Pre- and post-conference attendee list	★	★	★
Full-page ad, Q4 2021 (Nov.) <i>Morningstar</i> magazine	★	★	★
Presence in virtual reality conference experience	★	★	
Scheduled 30-minute prerecorded presentation with Q&A	2	1	
Scheduled 30-minute Meet the Manager Zoom session with Q&A	2	1	
Branded item in attendee welcome kit	★	★	
Push notifications to attendees	★	★	
Booth poll to help you interact with visitors	★		
In-show email to all attendees	★		
Survey question in post-conference survey sent to attendees	★		

Sponsorship Opportunities for the In-Person Conference

Day 1 Breakfast	\$10,000
Day 2 Breakfast	\$10,000
Day 1 Break	\$15,000
Day 2 Break (AM)	\$15,000
Day 2 Break (PM)	\$15,000
Day 1 Lunch	\$20,000
Day 2 Lunch	\$25,000
Day 1 Reception	\$30,000
Day 2 Reception	\$40,000

Put your brand at the forefront of these popular conference activities. Sponsorship for the Day 2 lunch includes five reserved dining tables, and the Day 2 reception will feature a concert by Chicago blues legend Buddy Guy. Sponsorship includes signage.

Speak to your Morningstar audience sales representatives for ideas on enhancing your presence.

Sponsorship Opportunities for the In-Person Conference

Grab & Go Coffee	\$20,000
Recharge Lounge	\$15,000
Hydration Station	\$7,500
Hotel Key Card	\$7,500
Shoe Shine	\$5,000

Whether attendees are getting a drink, recharging their electronics, or getting out their room keys, these opportunities are a great chance to give your brand a consistent presence during all three days of the conference. Sponsorship includes signage.

Sponsorship Opportunities for the In-Person Conference

Exhibit Hall Booth

\$7,500

All digital sponsors receive a complimentary 10' x 10' booth in our Exhibit Hall at McCormick Place. If you're not a sponsor and you wish to exhibit at the conference, single booths are available to purchase. Booths come with a table and two chairs plus one registration.

To become a sponsor, call Daniel Skelton
at +1 312 696-6151 or send an
email to daniel.skelton@morningstar.com

