

Morningstar Investment Conference

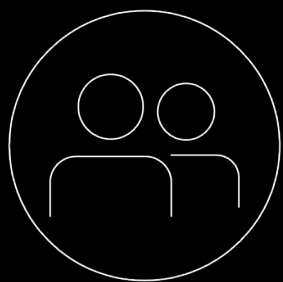
2022 Sponsor Kit

US

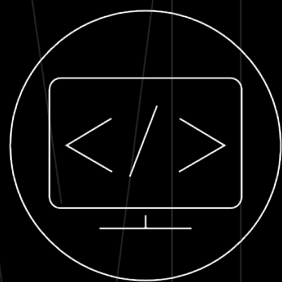
MIC

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 2021 we launched a new hybrid 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

May 16–18, 2022

On-demand sessions through

June 17, 2022





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 2021 conference.

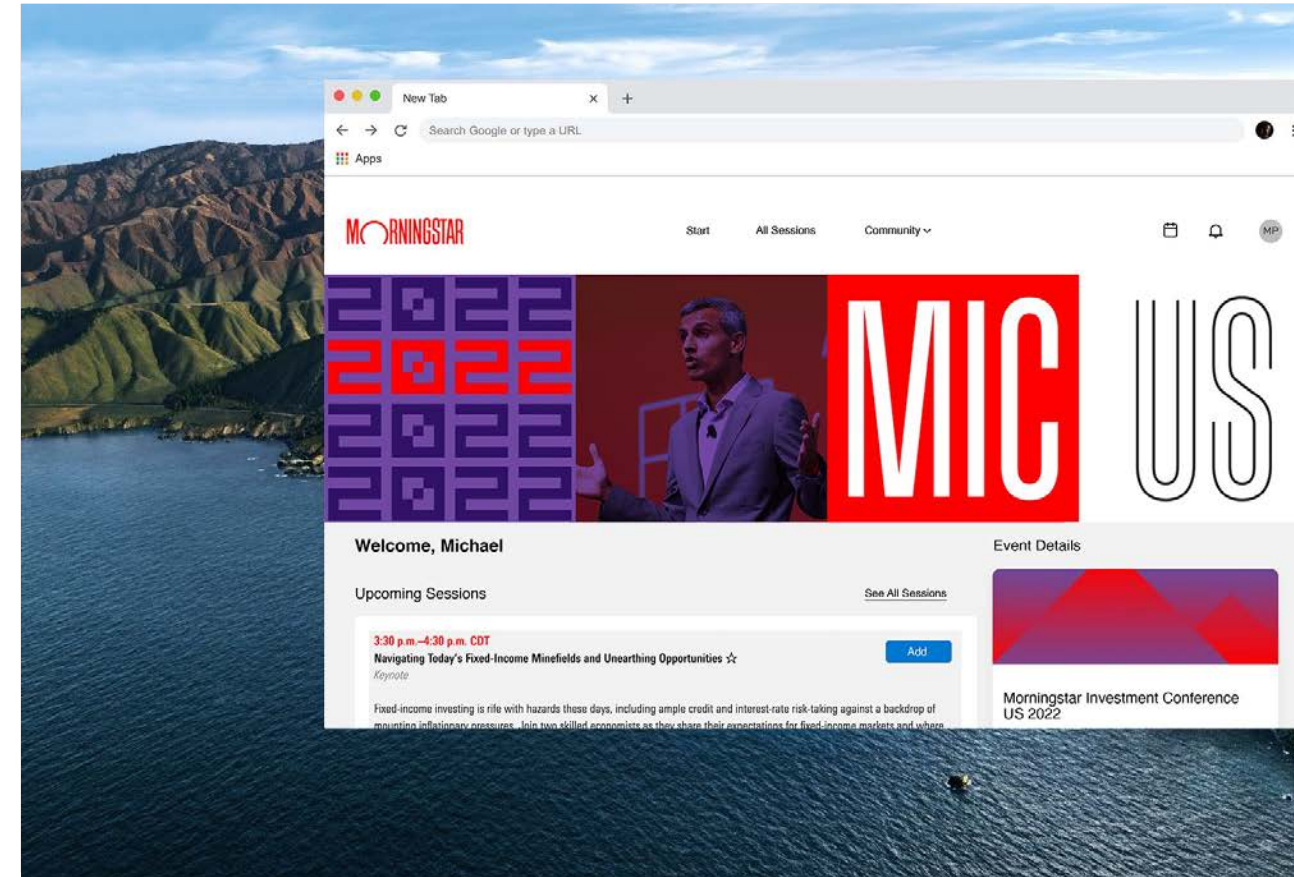
A faint, stylized background graphic of the American flag, featuring a large circle for the blue field with stars and a series of vertical lines for the stripes.

Over 2,500 people participated in our hybrid U.S. conference, either in person, digitally, or in virtual reality.

The conference featured **32 sessions** and **98 speakers and moderators**.

We chose **Cvent Virtual Attendee Hub** for our digital events because it is built on the industry's leading platform and provides more value for sponsors.

cvent



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

1

**Non-Morningstar
speakers and content**

2

**Generate investment ideas
from the latest research**

3

**Morningstar speakers
and content**

4

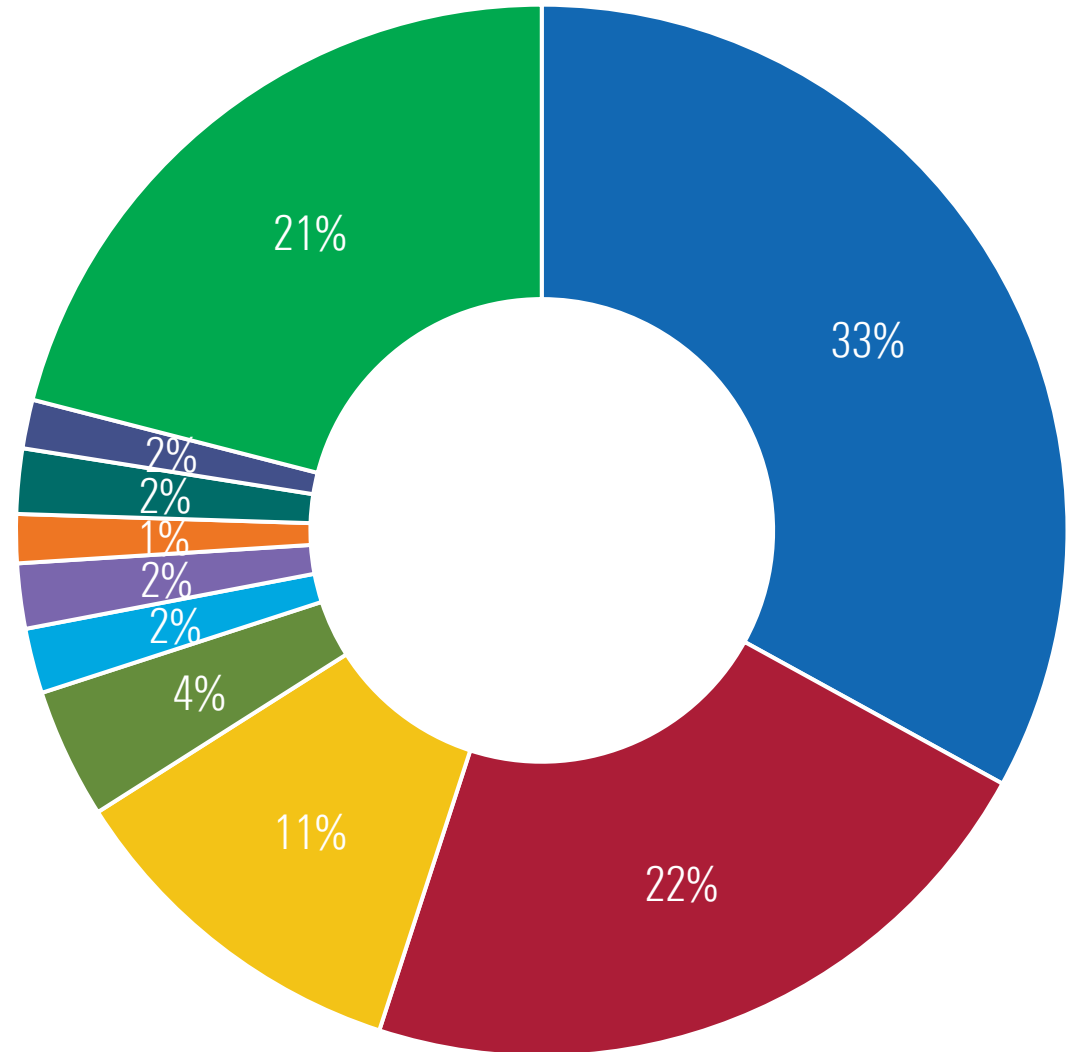
Industry networking



Conference Statistics

Attendees by Firm Type

| | % |
|---|----|
| Asset Management Firm | 33 |
| Registered Investment Advisory Firm (RIA) | 22 |
| Broker / Dealer | 11 |
| Consulting Firm | 4 |
| Individual Investor | 2 |
| Private Bank / Trust Company | 2 |
| Insurance Firm | 1 |
| Academic Institution / Library | 2 |
| Retirement Plan Provider | 2 |
| Other* | 21 |



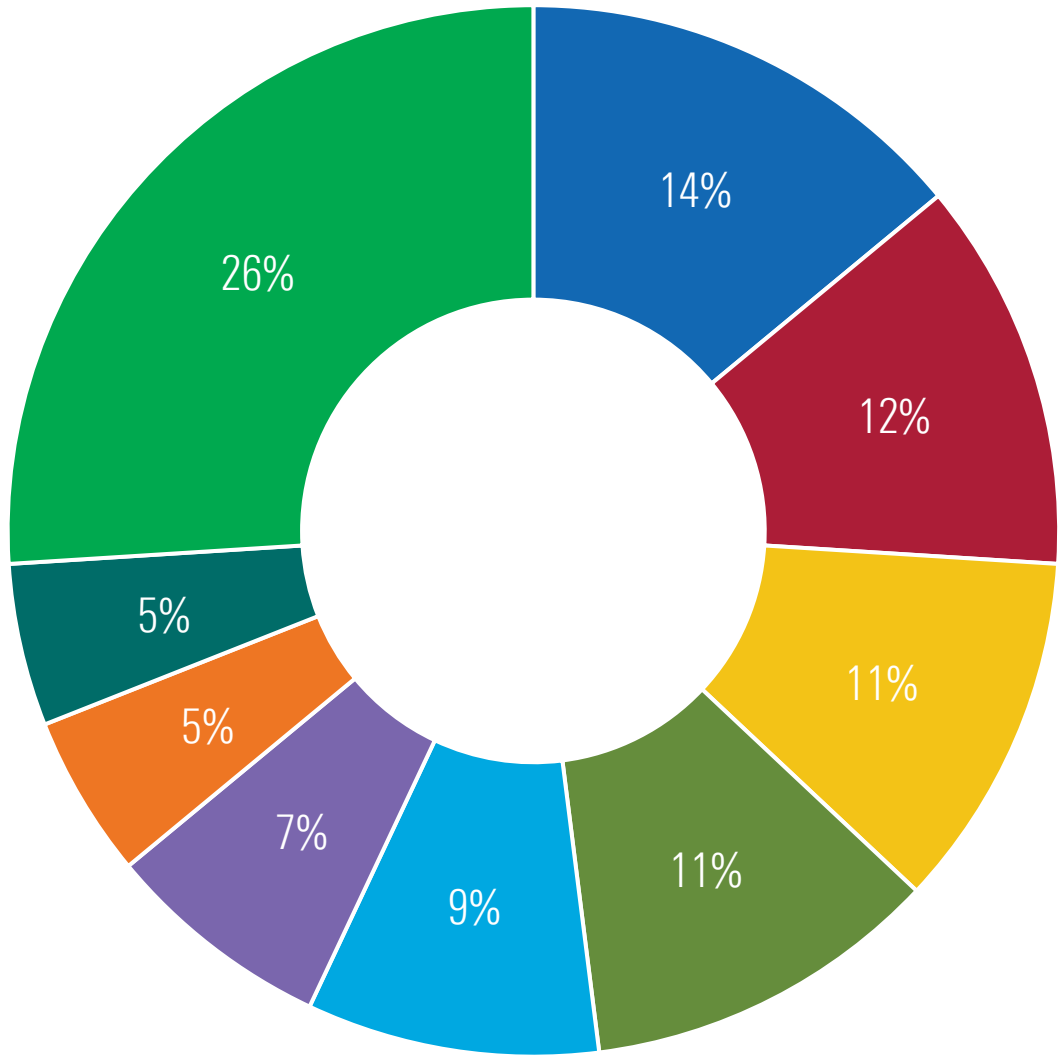
* Includes: Clearing Firm/Custodial Firm, Employer/Plan Sponsor, Exchange, Government/Regulatory Institution, Hedge Fund, Index Provider, Media/Publication, Pension/Foundation/Endowment, Private Equity Firm, Retirement Plan Provider, Sovereign Wealth Fund, Trade Association, Wirehouse, and others.

Source: 2021 Morningstar Investment Conference Online CVENT attendee registration data.

Conference Statistics

Attendees by Role Type

| | % |
|---|----|
| Registered Investment Advisor/Financial Planner | 14 |
| Portfolio Management | 12 |
| Sales/Relationship Management | 8 |
| Investment Advisory | 11 |
| Executive Management | 9 |
| Product Management | 7 |
| Business Development/National Accounts | 5 |
| Marketing | 5 |
| Other* | 26 |



* Includes: Due Diligence, Investment Committee, Consulting, Operations/Technology, Individual Investor, Investor Services, Performance & Risk team, Retirement Investments Consulting, Finance/Treasury, Compliance, Compensation, Talent Management, Procurement, Insurance, and others.

Changes To Our Attendee List Model

Most of our conference attendees choose to opt out of sponsorship communications, making it increasingly difficult to provide our sponsors with quality post-event attendee lists. So this year, we will not be providing a list of “opted-in” conference attendees.

Instead, we’re rolling out some new ways for sponsors to capture contact information:

- ▶ **In-Person Booths**

Sponsors will get access to lead-scanning technology, so exhibitors can scan attendee badges to collect contact information.

- ▶ **Digital Booths**

Sponsors will receive a list of all attendees who visit a digital booth.

We think these changes will deliver higher-quality lead lists for all of our sponsors, and honor attendee data privacy better than ever. If you have any questions, please reach out to your sales representative.

Sponsor Package Benefits Overview

| | Principal | Lead | Major | Associate |
|--|-------------------------|-------------------------|-------------------------|---------------------|
| Exhibit Hall (McCormick Place) | 1 Available \$75,000 | 2 Available \$55,000 | 6 Available \$35,000 | Limited \$20,000 |
| 20' X 20' Booth | ★ | ★ | | |
| 10' X 20' Double Booth | | | ★ | |
| 10' X 10' Booth | | | | ★ |
| Exhibitor Passes | 10 | 8 | 7 | 4 |
| Digital Conference | | | | |
| Digital Booth (Logo, Booth Description, and Limited Downloads) | ★ | ★ | ★ | ★ |
| Meet the Manager on the platform Monday morning | ★ | ★ | ★ | |
| Digital Exhibitor Passes | 10 | 8 | 7 | 4 |

Sponsor Package Benefits Overview

| | Principal | Lead | Major | Associate |
|---|-------------------------|-------------------------|-------------------------|---------------------|
| Branding | 1 Available \$75,000 | 2 Available \$55,000 | 6 Available \$35,000 | Limited \$20,000 |
| Tuesday keynote luncheon | ★ | | | |
| Pre-conference luncheon or opening break | | ★ | | |
| Breakfast, break, or Monday reception | | | ★ | |
| Hotel in-room drop | | ★ | | |
| Logo placement on website, emails, signage and mobile app | ★ | ★ | ★ | ★ |
| Logo hyperlink on website and mobile app | ★ | ★ | ★ | ★ |

Sponsor Package Benefits Overview

| | Principal | Lead | Major | Associate |
|---|-------------------------|-------------------------|-------------------------|---------------------|
| Technology | 1 Available \$75,000 | 2 Available \$55,000 | 6 Available \$35,000 | Limited \$20,000 |
| Wi-Fi Sponsor | ★ | | | |
| Mobile app with banner ad and push notification | ★ | | | |
| Lead scanner technology at booth | 8 | 6 | 4 | 2 |
| Listing in mobile app | ★ | ★ | ★ | ★ |
| Advertising | | | | |
| Full page ad in Morningstar Magazine (Q2 or Q3) | ★ | ★ | ★ | ★ |

Sponsor and Exhibitor Add-Ons

| | | |
|-----------------------------------|--|---|
| Presentation Stage | Reserve the presentation stage during breaks for up to 1 hour. A perfect opportunity to get in front of conference attendees with the topic of your choice. Sponsors will be able to capture contact information from attendees. | 3 Available \$20,000 |
| Hotel Branded Keycard | Place your logo on the keycards used at our host hotels for conference guests. | 1 Available \$15,000 |
| Hotel In-Room drops | Provide a branded item to attendees staying at our host hotels. | 4 Available \$12,000 |
| Hydration Station | Located in the exhibit hall. Branded with your logo and design and can be placed close to your booth. | 1 Available \$10,000 |
| Shoeshine | Located in the exhibit hall. Can be a separate station or next to your booth. | 1 Available \$10,000 |
| New Meet the Manager Kiosk | Provide an opportunity for attendees to meet with your prominent fund managers during breaks between sessions. Kiosk located in the exhibit hall. | Limited Availability \$10,000 |
| New Golf Game | Add a little fun for attendees by sponsoring the virtual golf game. | 1 Available \$10,000 |
| New Luggage Check | Logo placement included. | 1 Available \$5,000 |

Additional Sponsorship Opportunities

Grab & Go Coffee Bar

The coffee bar is a 40' X 40' space in the exhibit hall where coffee and espresso are served throughout the conference.

1 Available
\$75,000

Promotion includes signage and one push notification on the mobile app.

Sponsors may provide two branded pull-up signs, napkins, and coffee sleeves.

This sponsorship also includes a 10' X 20' booth with lead scanner technology, 8 in-person exhibitor registrations, and 8 digital exhibitor registrations.

Additional Sponsorship Opportunities

Recharge Lounge

The recharge lounge is a 40' X 40' space in the exhibit hall where attendees can re-charge their devices. Snacks and fruit-infused water are served in the lounge throughout the conference.

Promotion includes signage and one push notification in the mobile app.

Sponsors may provide two pull-up signs for the lounge.

This sponsorship also includes a 10' X 20' booth with lead scanner technology, 4 in-person exhibitor registrations, and 4 digital exhibitor registrations.

1 Available
\$45,000

Exhibitor Opportunities

| | 10' X 10' Booth | 10' X 20' Booth |
|--|-----------------|-----------------|
| Exhibit Hall (McCormick Place) | \$10,000 | \$18,000 |
| Exhibitor Passes | 2 | 4 |
| Lead scanner technology at booth | 1 | 2 |
| Digital Conference | | |
| Digital Booth (Logo, Booth Description, and Limited Downloads) | ★ | ★ |
| Digital Exhibitor Passes | 2 | 4 |
| Branding | | |
| Listing on Website and Mobile App | ★ | ★ |

Cancellation Policy: Booth registration fees are 100% refundable if Morningstar receives a written cancellation notice by March 4, 2022. No refunds will be given after March 4, 2022.

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

