

# Morningstar Investment Conference

June 25–26  
Navy Pier, Chicago

Sponsorship Kit

2025

2025

2025

2025



## Why Sponsor MIC?

MIC assembles top investment experts to discuss industry trends, investment research, and the market environment. Attendees are a highly qualified audience of investment advisors and financial planners looking for business management solutions, making sponsorship a powerful way to expand your brand.

MIC sponsorship is recommended for:

- ▶ Investment companies expanding advisor relationships and product reach
- ▶ Software and fintech companies looking to reach an advisor audience
- ▶ Broker-dealers focused on recruitment and networking opportunities
- ▶ Organizations connecting with industry leaders for collaboration

## Why Do Attendees Choose MIC?

The top three reasons:

- 1 Allows attendees to evaluate prospective investment management firms for outsourcing
- 2 Provides networking opportunities with peers
- 3 Enables learning more about Morningstar products





## Elevate Your Brand

MIC is one of the most effective ways to directly reach key stakeholders and decision makers.

Maximize your firm's visibility to a captive audience of experienced financial professionals with a conference sponsorship.

Join us and experience how MIC can elevate your presence.



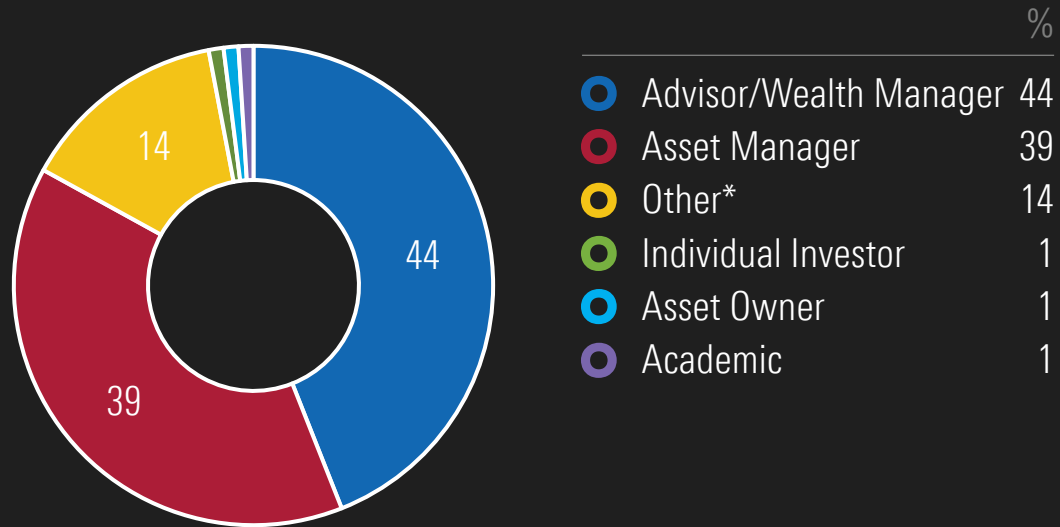
## Hosted Advisor Meetings

The Hosted Advisor Meetings provide an in-person, one-on-one meeting experience between Hosted Advisor pass holders and sponsors, using a double opt-in process to ensure mutual interest. This setup facilitates quick and efficient connections, fostering potential partnerships in a dynamic setting.

Hosted Advisor pass holders must share their contact details with sponsors and schedule a minimum of two appointments with sponsor representatives. Our new AI-enhanced meeting scheduling software ensures that attendees connect with the most relevant sponsors, maximizing the value of their time at the conference.

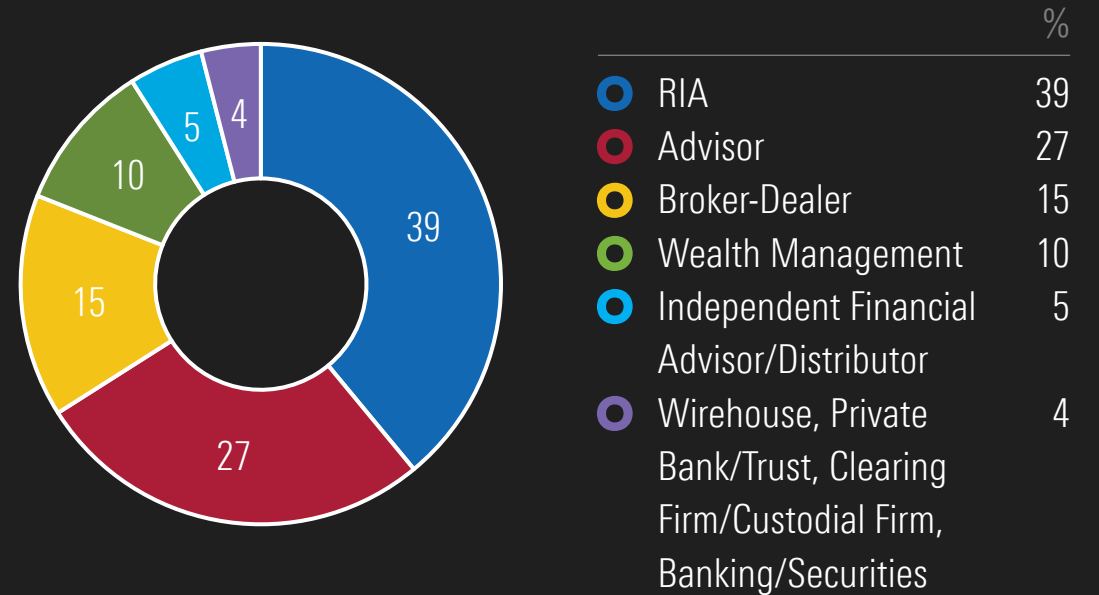
# 2024 Conference Statistics

## Attendees by Firm Type



\* Other includes: C&E—Commodity Trading, C&E—Energy (Gas), C&E—Energy (Oil), C&E—Energy (Power), C&E—Investment Bank, C&E—Other, C&E—Refining, C&E—Utility, Commodity Trading, Consulting, Dealer Group/Licensee/Stockbroker, Exchange, Government/Regulatory Institution, Index Provider, Media/Publication, Sell-Side—Sales and Trading, Trade Association

## Advisor Firm Types





# 2024 Conference Statistics

779

Hosted Advisor Meetings

2,250+

people participated  
in our conference

413

Connections made in the  
Braindate Lounge

8.3M

impressions and 1,800+  
engagements via social

1,700+

conference mobile app  
downloads, a sponsor benefit

1,511

participants in the Meet  
the Manager sessions



## Media Attention at MIC

MIC attracts top businesses, financial journalists, and media companies. As a sponsoring firm, you will receive the media attendee list one week in advance of the conference.

AAll  
AARP  
Advisor Perspectives  
Bloomberg  
Barron's  
Chicago Tribune  
Citywire  
Crain's Chicago Business

CNBC  
ETF.com  
Financial Advisor  
Financial Planning  
Financial Times  
Fortune  
GreenBiz Group  
Hearst

Ignites  
InvestmentNews  
Investor's Business Daily  
MarketWatch  
Money Magazine  
NerdWallet  
Pensions & Investments  
Reuters

ThinkAdvisor  
Wall Street Journal  
WealthManagement.com  
Wealth Professional  
and more.



## Join the Conversation

Meet investors in the digital space, too. The Morningstar social media team maintains an active presence leading up to, and during, the conference.

### **Digital Social Media Kit**

You'll receive assets and sample messaging so your team can promote your presence at the 2025 MIC. We recommend attending firms use the official conference hashtag #MICUS to gain visibility and be part of conference conversations.

### **Live Conference Broadcasts**

The social media team will host via LinkedIn Live, X Spaces, and Instagram Live (subject to change). To learn more about our approach to social media at MIC, contact [socialmediateam@morningstar.com](mailto:socialmediateam@morningstar.com).

## Support for Your Lead Gen Goals

In addition to the pre- and post-conference opt-in attendee list, sponsors will be able to capture opt-in attendee contact information via lead-scanning technology.

### **Lead Scan Devices**

Sponsors will get access to lead-scanning technology, so exhibiting teams can scan attendee badges to collect contact information whether your team is in the booth or connecting with attendees anywhere at the conference.

### **Pre and Post Conference Attendee List**

Sponsors will get a list of opted-in attendees twice: six weeks and two weeks prior to the conference. A post-conference attendee list will be provided one week after the conference.

## Further Your Impact

We continually implement changes to align with sustainability best practices. As a sponsor, we encourage you to join us in our efforts, as well as support your firm's sustainability initiatives.

### **Eco-friendly (and lead-gen oriented) ways to share your content**

- ▶ Upload your firm's latest research and white papers to the conference mobile app
- ▶ Create QR codes and share your documents digitally
- ▶ Email relevant content to attendees using the information your team obtained via Lead Capture

### **Ways to think about your branded giveaways**

- ▶ Only purchase recyclable or sustainably sourced items
- ▶ Offer fewer, higher quality, sustainably sourced items to create demand
- ▶ Require participants to be scanned by Lead Capture in exchange for the giveaway
- ▶ Use your giveaway budget and offer an attendee experience



# Craft Your Experience

Let's work together to create innovative sponsorship opportunities

Our pre-packaged options in this kit are your starting point, beginning with 10' x 10' or 10' x 20' booths. Sponsorship packages are flexible, and Freeman Exhibitor Services can work with your team to reimagine your booth to meet your goals. Creativity is encouraged and helps make the biggest impact.



## Sponsorship Levels

This year, we're introducing customizable sponsorship options to reflect each partner's unique goals. Our four sponsorship tiers let you create a tailored package — whether you aim to boost brand visibility, engage attendees, or highlight innovations. Your total investment will determine your tier, ensuring a flexible approach that aligns with your objectives.

Tier 1 Sponsor: \$100,000+

Tier 2 Sponsor: \$80,000+

Tier 3 Sponsor: \$60,000+

Tier 4 Sponsor: \$35,000+

## Sponsor Packages

Packages A, B, and C include speaking opportunities on our sponsor stage. Our team can help tailor a package to meet your goals.

### Package A

\$100,000 (1 available)

- 20' x 20' booth
- 12 registrations
- 2 Meet the Manager sessions
- Logo placement
- Hyperlink on website & app
- Wi-Fi sponsor
- App sponsor w/ banner ad
- App push notification
- Prepopulated Braindate
- Hosted Advisor Meetings
- 8 lead scanners at the booth

### Package B

\$80,000 (2 available)

- 20' x 20' booth
- 10 registrations
- Meet the Manager session
- Logo placement
- Hyperlink on website & app
- App push notification
- Prepopulated Braindate
- Hosted Advisor Meetings
- 6 lead scanners at the booth

### Package C

\$60,000 (4 available)

- 10' x 20' booth
- 8 registrations
- Meet the Manager session
- Logo placement
- Hyperlink on website & app
- App push notification
- Prepopulated Braindate
- Hosted Advisor Meetings
- 4 lead scanners at the booth



## Sponsor Packages

Discover your sponsorship options and find the perfect fit. Our team can help tailor a package to meet your goals.

### Package D

\$45,000 (4 available)

- 10 x 20 booth
- 8 registrations
- Logo placement
- Hyperlink on website & app
- App push notification
- Prepopulated Braindate
- Hosted Advisor Meetings
- 4 lead scanners at the booth

### Package E

\$35,000 (limited availability)

- 10 x 10 booth
- 6 registrations
- Logo placement
- Hyperlink on website & app
- Prepopulated Braindate
- Hosted Advisor Meetings
- 2 lead scanners at the booth
- Ad in *Morningstar* magazine

## Special Opportunities

### Exclusive Coffee Sponsor

Become the exclusive sponsor of espresso-based drinks and drip coffee at three locations throughout the exhibit hall.

Promotion includes a 10' x 20' booth, Hosted Advisor Meetings, lead scanning, eight registrations, signage, and one push notification on our conference mobile app.

Sponsors may provide branded napkins and branded coffee sleeves for additional branding.

**\$80,000 (1 available)**





# Special Opportunities

## Opening Night Reception

Sponsor parts of the big night out during the conference at Navy Pier on Wednesday, June 25.

The indoor/outdoor event (weather permitting) along the lake will take place at Navy Pier's Offshore, featuring live music, great food and beverages, and the chance to connect with conference attendees.

Sponsorship includes one push notification and signage.

**Food sponsorship:** \$20,000 (1 available)

**Bar sponsorship:** \$20,000 (1 available)

**Entertainment sponsorship:** \$20,000 (1 available)





# Special Opportunities

## Break Lounge

Become the outlet for connection with a space where attendees can charge their devices, grab snacks, and enjoy a beverage throughout the conference.

Promotion includes four registrations, a 10' x 20' booth, Hosted Advisor Meetings, and lead scanning.

Sponsors may provide branded napkins for additional visibility.

**\$50,000 (1 available)**





# Special Opportunities

## Braindate Lounge

Foster conversations in the Braindate Lounge, the go-to hub for attendees seeking one-on-one or small group discussions.

The lounge features a 45-minute takeover for the topic or topics of the sponsor's choice.

Outside this takeover, attendees can reserve tables for the topics of their choice in 45-minute group sessions or 30-minute one-on-ones.

In addition to being prominently showcased in the Braindate Topic Market, sponsors will receive four conference registrations, a featured push notification in our conference app, onsite signage, and a 10' x 20' booth.

**\$50,000 (1 available)**



# Additional Sponsorship Opportunities

## **Sponsored Presentations**

Get in front of attendees with up to 50 minutes on our sponsor stage on the topic of your choice. Sponsors will be provided with a list of attendees and a recording of their session for digital distribution.

**\$40,000 (4 available)**

## **Lunch — Day 1 or Day 2**

Sponsorship includes two reserved tables, signage, and a push notification on our conference mobile app. Sponsors can also enhance their branding by providing customized napkins.

**\$40,000 (1 available per day)**

## **Transportation Sponsor**

Sponsor the transportation shuttles, stopping at Navy Pier and each hotel. Sponsorship includes shuttle branding.

**\$30,000 (1 available)**

## **Podcast Presentation**

Back by popular demand! Be heard with an exclusive spot on our Podcasting Stage. Sponsors will get 30 minutes to record in front of a live audience with all equipment provided.

**\$25,000 (2 available)**

## **Breakfast — Day 1 or Day 2**

Sponsorship includes two reserved tables, signage, and a push notification on our conference mobile app. Sponsors can also enhance their branding by providing customized napkins.

**\$25,000 (1 available per day)**

# Additional Sponsorship Opportunities

## **Morning & Afternoon Snack—Day 1 or Day 2**

Sponsor day one's grab-and-go coffee plus a morning and afternoon snack in the Aon ballroom, where the conference begins and ends daily. Sponsorship includes tabletop signage at the stations. Sponsors can also enhance their branding by providing customized napkins.

**\$20,000 (1 available per day)**

## **Hydration Station**

Supply water to conference attendees by sponsoring water stations in the exhibit hall and Aon ballroom. Promotion includes stations branded with your logo and prefilled reusable bottles with your logo.

**\$20,000 (1 available)**

## **Arcade Golf**

Show off your swing by sponsoring the virtual golf game, featuring contests for closest to the pin and hole in one. Sponsorship includes one push notification and signage.

**\$15,000 (1 available)**

## **Host Hotel Key Cards**

Ask your sales representative for details.

**\$15,000 (1 available)**



To become a sponsor, contact  
one of our sales directors

**East Coast (except NY & NJ) & West Coast:**

Lisa Turner

[lisa.turner@morningstar.com](mailto:lisa.turner@morningstar.com)

773 960 7646

**Midwest:**

Emily Martin

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602 690 0265

**New York & New Jersey:**

Dan Atkinson

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312 696 6570.

**MORNINGSTAR**

