SPONSORSHIP PROSPECTUS

Omni Orlando Resort at ChampionsGate
Orlando, Florida
The IRI Marketing Summit 2018 is the largest conference of senior marketing and sales decision makers in the insured retirement industry. Hosted by IRI, the conference will be held March 12 - 14, 2018 at the Omni Resort at ChampionsGate in Orlando, FL.

Each year the summit draws hundreds of senior professionals from our diverse membership. Over the course of two days, the program examines the latest marketing innovations, product development trends, advisor engagement strategies and takes an in-depth look at the future of the industry.

The conference offers a number of sponsorship opportunities, a mobile app and an online program book with available ad space.
# IRI MARKETING SUMMIT 2018 SPONSORSHIP OPPORTUNITIES

## Summit Premier Sponsorships

<table>
<thead>
<tr>
<th>BENEFIT</th>
<th>CHAIRMAN</th>
<th>PRESIDENT</th>
<th>DIRECTOR</th>
<th>ASSOCIATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complimentary Passes</td>
<td></td>
<td>4</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Promoted Post in Mobile App</td>
<td>X</td>
<td></td>
<td>X</td>
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<tr>
<td>Push Notification in Mobile App</td>
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<td></td>
<td></td>
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<tr>
<td>Seat on Planning Committee</td>
<td></td>
<td>Marketing Summit AND Annual Meeting</td>
<td>Marketing Summit OR Annual Meeting</td>
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</tr>
<tr>
<td>Logo in General Session Video Loop</td>
<td>X</td>
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<td>X</td>
<td>X</td>
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<tr>
<td>Verbal Recognition in General Session</td>
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<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Linked Logo on Conference website</td>
<td></td>
<td>Company Description and Contact Info</td>
<td>Company Description and Contact Info</td>
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<tr>
<td>Logo Displayed in Registration Area</td>
<td>X</td>
<td></td>
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<tr>
<td>Digital Program Sponsor Page with Full Color Logo</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
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<tr>
<td>Full Color Logo, Company Description, Contact Info in Mobile App</td>
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<td></td>
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<tr>
<td>Networking Opportunities</td>
<td>X</td>
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<td>X</td>
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<tr>
<td>Opportunity to Develop New Contacts and Leads</td>
<td>X</td>
<td></td>
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<tr>
<td>Email List of Attendees in Excel Two Weeks Before and After*</td>
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**Conference Recap Sponsor Add-On**

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<tr>
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<th>ASSOCIATE</th>
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<tbody>
<tr>
<td>See p.3 for more details</td>
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<td>See p.3 for more details</td>
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<table>
<thead>
<tr>
<th>COST</th>
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<th>ASSOCIATE</th>
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<tbody>
<tr>
<td>$15,000</td>
<td></td>
<td>$12,500</td>
<td>$7,500</td>
<td>$3,500</td>
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</table>

*Email List of Attendees are available to Associate level sponsors at an additional cost.*
Additional à la carte Sponsorship Opportunities

Marketing Summit 2018 offers a number of exclusive à la carte event sponsorship opportunities. Customized sponsorship packages are available:

- Meeting space Wi-Fi……………………………………$15,000 or shared for $5,000 (3 available)
- Welcome Reception .......................................... $7,500
- Networking Reception ....................................... $7,500
- Hotel Room Key Cards ..................................... SOLD
- Tote Bags ........................................................ $5,500
- Badge Lanyards .............................................. $5,500
- Mobile App Presenting Sponsor......................... SOLD

Program Advertising

Gain exposure with an ad in the online program guide:

- Inside Front Cover ................................. $2,000
- Outside Back Cover ............................... $2,000
- Inside Back Cover .................................. $2,000
- Full Page ............................................. $1,500
- 1/2 Page Ad ........................................ $1,000

The Summit à la carte sponsorship opportunities and program advertising also include:

- Logo on registration area signage, mobile app (with contact info), and program sponsorship page
- Verbal recognition and logo displayed at sponsored functions if applicable
IMPORTANT 2018 DATES

2017
December 18
Early registration deadline

2018
February 17
Preferred registration deadline

2018
February 2
Sponsors must submit a company description (100-word maximum), including the company’s contact person, address, phone, fax and email address for the inclusion on the IRI Marketing Summit 2018 app.

2018
February 2
Logo for final program and on-site signage due.

2018
February 2
Ads for final program due.

2018
February 24
Deadline for discounted room reservations at the Omni Resort at ChampionsGate in Orlando, FL.

2018
February 24
Cancellation requests received after January 19 and before February 19 will be issued a 50% refund less a 50 non-refundable processing fee. No refunds will be issued after February 20, 2018.
Company Name: ____________________________________________________________

Pre-Conference Contact: __________________________________________________

Title: ____________________________________________________________________

Address: __________________________________________________________________

City: ___________________________ State: ___________ Zip: _________________

Phone: __________________________ Fax: _________________________________

E-mail: ___________________________________________________________________

Please indicate Premier sponsorship level:

❑ Chairman ($15,000)

❑ President ($12,500)

❑ Director ($7,500)

❑ Associate ($1,500)

Or

Please indicate sponsored a la carte item: ________________________________ Price: ____________

Please indicate appropriate method of payment:

❑ Check Enclosed       ❑ Credit Card

TOTAL AMOUNT DUE: $ _____________________________________________________________

Card Number: ___________________________ Exp. Date: _____________________________

Name of Cardholder: ___________________________ Signature: ________________________

No refunds will be given for cancellation of advertising or sponsorships. I understand my credit card will be charged for the items I have selected, according to my membership status. By signing this form, I authorize IRI to charge my credit card for the appropriate fee based on my member status, as set forth above.

Please return these forms with payment to: IRI Sponsorships • 1100 Vermont Avenue, NW, 10th Floor Washington, DC 20005 or fax to (202) 469-3030 • Attention: Conferences Checks should be made payable to the Insured Retirement Institute.
About the Insured Retirement Institute

The Insured Retirement Institute (IRI) is the leading association for the retirement income industry. IRI proudly leads a national consumer coalition of more than 30 organizations, and is the only association that represents the entire supply chain of insured retirement strategies. IRI members are the major insurers, asset managers, broker-dealers/distributors, and 150,000 financial professionals. As a not-for-profit organization, IRI provides an objective forum for communication and education, and advocates for the sustainable retirement solutions Americans need to help achieve a secure and dignified retirement. Learn more at www.irionline.org.

Insured Retirement Institute (IRI)
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Washington, DC 20005
202.469.3000 | www.IRlonline.org