

## 2012 Morningstar ETF Invest Conference

You're invited to participate as a sponsor.

October 3–5, 2012 / Radisson Blu Aqua Hotel Chicago / 221 North Columbus Drive

The Morningstar ETF Invest Conference brings together financial advisors, asset managers, and industry experts to discuss investing strategies and the ETF marketplace. This audience of engaged financial professionals is looking for ideas and solutions to make better-informed decisions for their clients.

At last year's event, more than 400 attendees walked the exhibit hall to meet with providers and network with other industry professionals. An ETF Invest Conference sponsorship is a limited and exclusive opportunity to showcase your products and services and get in front of key investment decision-makers looking for answers.

The ETF Invest Conference caters to asset-management firms that create their own ETF strategies and also to the do-it-yourself advisor managing money on behalf of his clients. As sponsors, ETF providers can reach both groups seeking products to use in managing assets, whether it's the independent financial planner or a portfolio manager creating strategies to be sold on advisor platforms.

Firms looking to increase the usage on their platforms also benefit greatly by sponsoring the conference. Investment advisors attend to learn about new tactics, product offerings, and options available to best run their businesses. As a sponsor, you can demonstrate the services, solutions, and strategies that you have available for financial planners to better serve their clients.

Sponsorship packages for the third-annual Morningstar ETF Invest Conference are available on a limited basis and will sell out fast. To reserve one of these limited sponsorship opportunities, please contact:

Fani Koutsovitis / [fani.koutsovitis@morningstar.com](mailto:fani.koutsovitis@morningstar.com) / 312 696-6505

\$45,000

# Marquee

Exclusive Opportunity

The Marquee sponsorship of the 2012 Morningstar ETF Invest Conference is an opportunity to be a key part of the attendee experience. Your company will be on display with a prime booth location in the main exhibit hall. Your logo will appear on the conference bag given to every attendee of the conference and on their room keys upon check-in at the Radisson Blu Aqua Hotel.

As the Marquee Sponsor, you will be the exclusive sponsor for a sit-down luncheon and keynote presentation. You will receive two passes to our invitation-only managed portfolios dinner for a great networking opportunity with upper-level asset managers. Sponsorship also includes five exhibitor conference registrations, five advisor guest passes, and logo placement in print ads, emails, direct mail marketing, and on the 2012 ETF Invest Conference website.

- Premier booth
- Sit-down luncheon sponsor
- Conference bag
- Keycard sponsorship
- Five exhibitor conference registrations
- Five advisor guest conference passes
- Two managed portfolios dinner passes
- Logo on website, print, email marketing, and direct mail

\$45,000

# Managed-Portfolios Gallery

Exclusive Opportunity

The Managed-Portfolios Gallery sponsorship is a new and exciting opportunity at this year's ETF Invest Conference. Outside of the main exhibit hall you will have entire sponsorship of an area designated for advisors seeking solutions from asset managers who construct portfolios using ETF products.

As the Managed-Portfolios Gallery Sponsor, you will get to select the eight management firms you would like to attend. These firms will have the chance to attend the conference and discuss their strategies with

advisors and platform providers, with the assistance of your sponsorship.

Your footprint will extend beyond asset managers with a door drop at the hotel room of every attendee and a premier booth location in the exhibit hall, along with exclusive signage in the Managed-Portfolios Gallery. Sponsorship also includes five exhibitor conference registrations, two managed portfolios dinner passes, and logo placement in print ads, emails, direct mail marketing, and on the 2012 ETF Invest Conference website.

- Exclusive signage
- Premier booth
- Door drop at hotel
- Five exhibitor conference registrations
- Eight portfolio manager gallery invitations
- Two managed portfolios dinner passes
- Logo on website, print, email marketing, and direct mail

## 2012 ETF Invest Sponsorship Levels

\$35,000

### Gold

Two Available

There are two Gold sponsorships available for the 2012 ETF Invest Conference. This is an excellent chance to increase your visibility throughout the event. As a Gold Sponsor, you have the opportunity to sponsor one of the cocktail receptions held in the exhibit hall, along with a joint sponsorship of the cybercafé and logo placement on either the conference pen or notebook distributed to all attendees upon registration.

Sponsorship also guarantees a table-top booth, four exhibitor conference registrations, five advisor guest passes, a dinner pass to our prestigious managed portfolios dinner, and logo placement in print ads, emails, direct mail marketing, and on the 2012 ETF Invest Conference website.

- Table-top booth
- Cocktail reception sponsor
- Pen (1) or notebook (1)
- Joint cybercafe sponsor
- Four exhibitor conference registrations
- Five advisor guest conference passes
- One managed portfolios dinner pass
- Logo on website, print, email marketing, and direct mail

\$25,000

### Silver

Five Available

Five Silver sponsorships are available for the 2012 ETF Invest Conference. Be recognized as either a breakfast or break sponsor for a chance to increase your presence at the event. As a Silver Sponsor, you will also receive an insert included in each attendee bag, along with a table-top booth, a dinner pass to our invite-only managed portfolios dinner, three exhibitor conference registrations, five advisor guest passes, and logo placement in print ads, emails, direct mail marketing, and on the 2012 ETF Invest Conference website.

- Table-top booth
- Bag insert
- Breakfast sponsor (2) or break sponsor (3)
- Three exhibitor conference registrations
- Five advisor guest conference passes
- One managed portfolios dinner pass
- Logo on website, print, email marketing, and direct mail

\$15,000

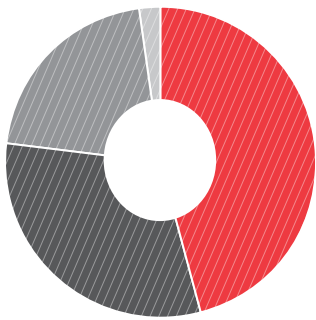
### Bronze

Limited Availability

Bronze sponsorships are available for those who want to exhibit at the 2012 ETF Invest Conference and feature their names and logos in conference marketing. Bronze Sponsors will get a table-top booth with two exhibitor conference registrations, two advisor guest passes, and placement in print ads, emails, direct mail marketing, and on the 2012 ETF Invest Conference website.

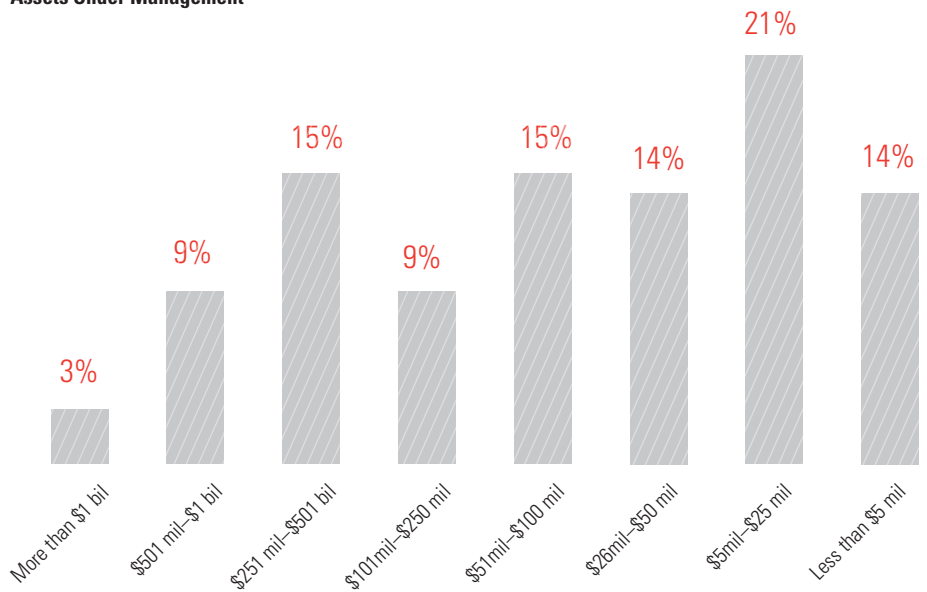
- Table-top booth
- Two exhibitor conference registrations
- Two advisor guest conference passes
- Logo on website, email marketing, and direct mail

Primary Method of Compensation



▲ Salary	46%
▲ Fee only	31%
▲ Both fee and commission	21%
▲ Commission only	2%

Assets Under Management

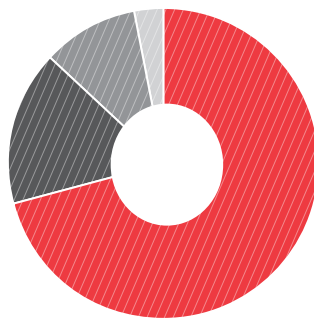


Asset-Management Firms

**72%**

of firms attending manage more than **\$250 million**

Years as a Financial Planner



▲ More than 10 years	71%
▲ 4-10 years	16%
▲ 1-3 years	10%
▲ Less than 1 year	3%

Firm Specialties

