

2024

Sponsorship Prospectus

2024 Networking Events

Sponsorship Opportunities & Event Calendar

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OFFERINGS & PRICING



Roundtables In-Person Meeting

Our highly popular series of in-person roundtable meetings bring together industry leaders and experts to discuss developments, trends and current issues facing specific distribution channels and product lines.

Our in-person Roundtables generally have two sponsorship levels which are based on the number of attendees a sponsoring firm chooses to send¹:

- Option A - \$14,500 and allows for two sponsor representatives
- Option B - \$11,000 and allows for one sponsor representative

¹ Executive Roundtable is an invitation only event for senior executives at large/ sophisticated firms. This event uses a different format than our other in-person roundtable meetings, therefore we limit the number of sponsoring firms and employ a different sponsorship cost. Please contact us for details.



Virtual Forum Online Meeting

Our online series of virtual forums covering issues, challenges and opportunities related to the annuity, insurance and structured product businesses in a 75 minute format.

We limit the number of sponsoring firms to a maximum of 3 for each session.

Virtual Forum sponsorship costs are \$3,250 for each meeting with a limit of 2 attendees from each sponsoring firm.

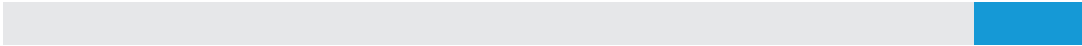


Virtual Roundtable Online Meeting

Combining the format of a traditional roundtable with the convenience of a virtual event, these discussions are more in depth and span of a two-hour period.

Given the format, we limit the number of sponsoring firms to a maximum of 6 for each session.

Virtual Roundtable sponsorship costs is \$5,250 with a limit of two representatives from each sponsoring firm.






2024 NETWORKING EVENTS

Dates are subject to change. We are still confirming dates with venues and will do everything possible to maintain the dates listed below.

IN-PERSON ROUNDTABLES

- | | |
|---|--|
|  <p>February 20-21
Insurance Distribution
Amelia Island, Florida</p> |  <p>September 18-19
Insurance & Annuity Executive
Amelia Island, Florida</p> |
|  <p>March 18-19
Annuity for Independent BDs
Nashville, TN</p> |  <p>October 9-10
Insurance Distribution
Scottsdale, AZ</p> |
|  <p>April 17-18
Structured Products
Boston, MA</p> |  <p>November 14-15
Annuities-All Channels
Amelia Island, FL</p> |
|  <p>May 09-10
Annuity for Banks, Regionals & Wires
Nashville, TN</p> |  <p>TBA
Alternative Investments</p> |
|  <p>July 24-25
Fee-Based Annuity
Denver, CO</p> | |

VIRTUAL/ONLINE EVENTS

- | | |
|--|--|
|  <p>February 8
CDA & In-Plan Annuity
Virtual Roundtable</p> |  <p>September 12
Annuity
Virtual Forum</p> |
|  <p>May 23
Outsourced Insurance Desk (OID)
Virtual Roundtable</p> |  <p>October 24
Structured Products
Virtual Forum</p> |
|  <p>June 6
Insurance
Virtual Forum</p> |  <p>November 21
Insurance -Planning for LTC
Virtual Roundtable</p> |

SCHEDULE

BENEFITS OF SPONSORSHIP




Saltzman Associates' highly regarded networking events provide an environment for members of our industry to discuss issues, challenges and opportunities related to the annuity, insurance, alternatives and structured product businesses within brokers dealers, RIAs, and banks/credit unions. We offer three different meeting formats that rely on sponsorship support so that representatives from brokers dealers, RIAs, and banks/credit unions can attend for free.

BENEFITS

BENEFITS	VIRTUAL FORUMS & VIRTUAL ROUNDTABLES	IN-PERSON ROUNDTABLES
Sponsor logos are featured on the event web page, event collateral and during the session.	✓	✓
Sponsors are free to participate in the regular discussion of the meeting	✓	✓
Where appropriate, sponsor representatives will be "featured" (called on/highlighted to comment/contribute during the session)	✓	✓
A directory is provided containing all participant contact info, including name, firm, title, email and phone number(s)	✓	✓
Sponsors are recognized repeatedly during each meeting and in all event functions	✓	✓
Digital video and audio recordings of the event	✓	
Each sponsor gets an opportunity during the session to directly address the attendees/promote their organization	✓	
Company logo recognition on signage displayed at the event		✓
In person networking opportunities with key decision-makers throughout the event, including group meals and receptions		✓
Additional sponsorship opportunities are available for in-person roundtable sponsors (ex. Wi-fi, reception, room drops and booklet ads).		✓

ADDITIONAL OPPORTUNITIES

In an effort to provide opportunities for additional recognition, Saltzman Associates has implemented additional sponsorship opportunities. **For In-Person Roundtables only.** Contact us for more details.

	<p>RECEPTION SPONSOR Sponsorship includes signage, table tents and an opportunity to address the group during the reception. In addition a specialty drink in your company's honor will be offered.</p>	<p>\$5,000 (1 per event)</p>
	<p>WiFi SPONSOR Acknowledgment as the roundtable wifi sponsor. Wifi code customized to display company/brand name and will be featured on screen prior to all presentations.</p>	<p>\$1,500 (1 per event)</p>
	<p>ROOM DROP We deliver sponsor's promotional materials, new product announcements, directly to the hotel rooms of roundtable attendees. Promotional materials not included.</p>	<p>\$500 (multiple per event)</p>

EXTRAS

Presentation Booklet Advertisements

Advertisements are placed prominently placed in the presentation booklets.

Color booklets are provided to all participants in both printed and electronic form.

FULL PAGE

\$750

HALF PAGE

\$500