Saltzman Associates

2027

Sponsorship Prospectus

2027 Networking Events

Sponsorship Opportunities & Event Calendar

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OFFERINGS & PRICING

OFFERINGS

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. These events generally have two sponsorship levels which are based on the number of attendees a sponsoring firm chooses to send[1]:

- Option A - $19,000 for two sponsor representatives
- Option B - $15,000 for one sponsor representative

[1] Executive Roundtable and the Compliance Roundtable use a different format than our other in-person events, therefore we employ a different sponsorship cost for these sessions. 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.

A maximum of 3 sponsoring firms per meeting.

- Sponsorship costs are $4,000 per meeting

Virtual Roundtable - Online Meeting

Combining the format of a traditional roundtable with the convenience of a virtual event. Virtual Roundtables allow for more in-depth discussions in a two-hour format.

A maximum of 6 sponsoring firms per meeting.

- Sponsorship costs is $6,000 per meeting

Spotlight Series - Online Meeting

This series will focus on showcasing our technology & carrier partners and providing introductions to product solutions, case studies and value added content.

- Inquire for pricing

SCHEDULE

2027 NETWORKING EVENTS

PRELIMINARY SCHEDULE - Dates and locations are subject to change

IN-PERSON EVENTS

Feb 18-19	Insurance Roundtable	Charlotte, NC
Mar 10-11	Business Ownership Transition Roundtable with LXCouncil	Charlotte, NC
Mar 16-17	Annuity Roundtable for Independent BDs & RIAS	Charlotte, NC
Apr 7-8	Structured Products Roundtable	Tampa, FL
May 20-21	Annuity Roundtable for Banks, Wires & Regionals	Charlotte, NC
Jul 14-15	Advisory Annuity Solutions Roundtable	Tampa, FL
Sep 15-16	Insurance & Annuity Executive Roundtable	Charlotte, NC
Sep 16-17	Compliance & Supervision Roundtable	Charlotte, NC
Oct 21-22	Insurance Roundtable	Orlando, FL
Nov 18-19	Annuity Roundtable	Orlando, FL

VIRTUAL EVENTS

Apr 20	Outsourced Insurance & Annuity Distribution Virtual Roundtable
May 26	Insurance Virtual Forum
Sep 1	Annuity Virtual Forum
Oct 7	CDA Virtual Roundtable
Nov 30	Planning for LTC Virtual Roundtable
Dec 9	Structured Products Virtual Forum

View Events page on our website for current dates and event descriptions.

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.

EXTRAS

Presentation Booklet Ad

Advertisements will be placed prominently in the presentation booklets. Booklets are provided to all participants in both print and digital formats.

- $500 per meeting

WiFi Sponsor

Acknowledgment as the roundtable WiFi sponsor. WiFi access code customized to display brand name.

- $1,500 per meeting (Limit 1 per meeting)

Reception Sponsor

Sponsorship includes signage, specialty cocktail and an opportunity to address the group during the reception.

- $5,000 per meeting (Limit 1 per meeting)

BENEFITS OF SPONSORSHIP

Saltzman Associates hosts well-respected networking events that create a space for industry members to engage in conversations about the issues, challenges, and opportunities connected to many facets of the industry. We provide various meeting formats supported by sponsorships, allowing representatives from these sectors to participate at no cost.

BENEFITS

BENEFITS	IN-PERSON ROUNDTABLES	VIRTUAL MEETINGS
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 are "featured" (called on/highlighted to comment/ contribute during the session)	✓	✓
Access to a directory of attendees containing contact info, including name, firm, title, email and phone number(s)	✓	✓
Sponsors are recognized repeatedly during each meeting and in all event functions	✓	✓
Each sponsor gets an opportunity during the session to directly address the attendees/promote their organization		✓
Company logo recognition on signage displayed on-site during 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	✓	