

**Morningstar®**  
**Investment Conference** | **Paris**  
**2018**

Sponsorship Kit

**Location: TBC**  
**6 September 2018**

## About the Event

As its ninth edition in Paris, our one-day conference seeks to showcase cutting-edge investment research and financial innovations from industry experts. This Morningstar event is a unique opportunity to meet and hear from authorities in the local and international financial field and to learn about new and traditional investment approaches to asset allocation, investment research and portfolio construction. The format features speeches by respected authorities in their fields and discussion rounds are hosted by our analysts and provide an interactive experience. Breaks allow for ample networking opportunities in a professional setting.

## Attendees

Morningstar will be reaching out to attract advisors and institutional investors in France. We expect to host more than 350 attendees.

Our clients and prospects base spans the entire spectrum of investors, including insurance firms, retirement plan providers, private banks, wealth managers, independent financial advisors, family offices and fund firms.

Email invitations to a qualified list of more than 20,000 contacts and personal invitations to selected names are an effective way to reach our target audience.

## Partnership

Strong partnership with media and financial associations support our conference's visibility.

## Speakers

Key to successful Morningstar events is a solid conference agenda. Responsibility lies with the agenda committee comprised of our respected analysts and editors. Their independence and integrity ensure a balanced and informative view to the relevant topics. Consequently, speaker slots are not available for purchase as they conflict with Morningstar's reputation for independence.

## Benefits of Sponsoring

- ▶ Position yourself as the brand of choice by being seen amongst the best in the business.
- ▶ Build relationships and loyalty with potential and existing clients.
- ▶ Be perceived as a leader by your peers.
- ▶ Showcase your product to your target market.

## Contact Details

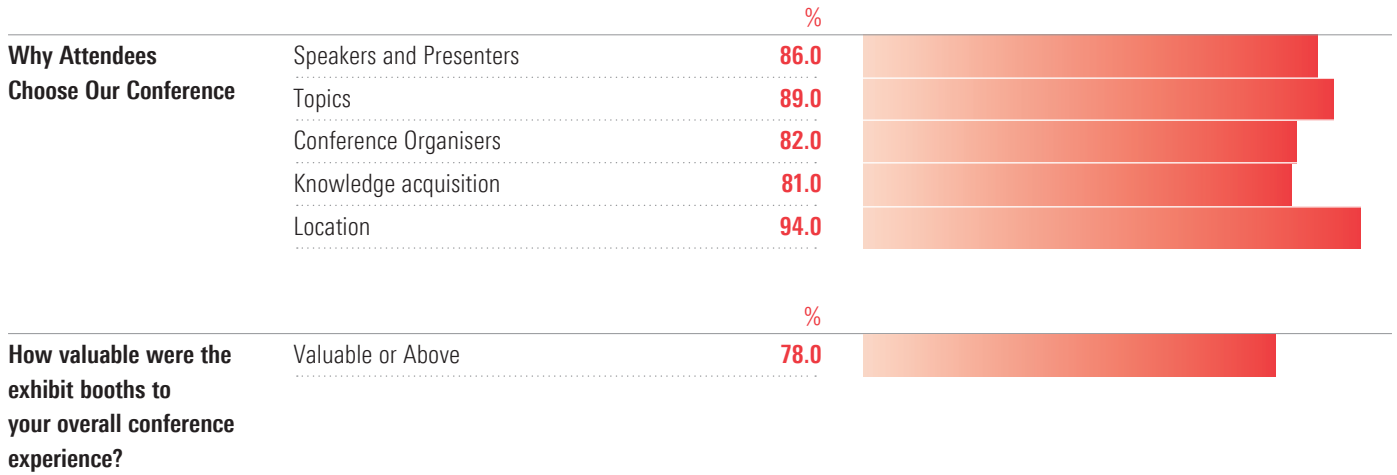
For more information on sponsorship opportunities please contact at [audience@morningstar.com](mailto:audience@morningstar.com)



# 2017 Conference Statistics — Delegates

Exhibiting at the Morningstar® Investment Conference is one of the most effective ways to reach those who make decisions about buying your products and services. Sponsoring the conference maximizes

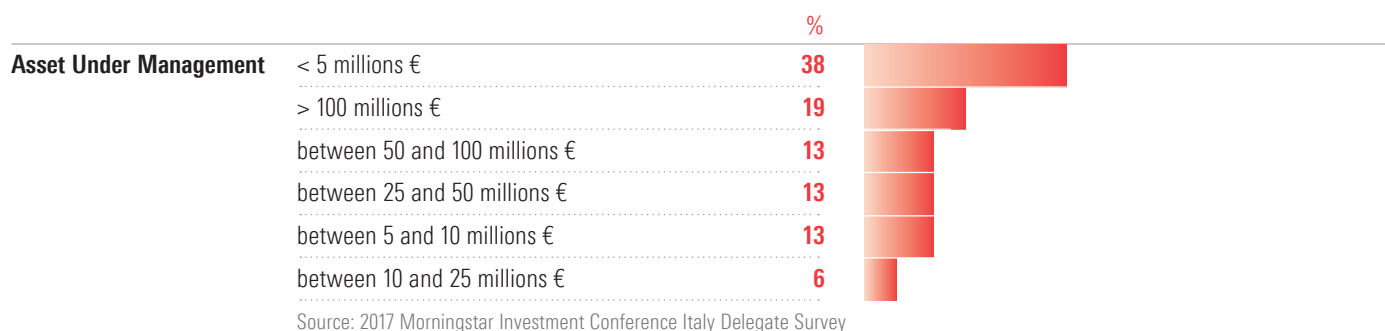
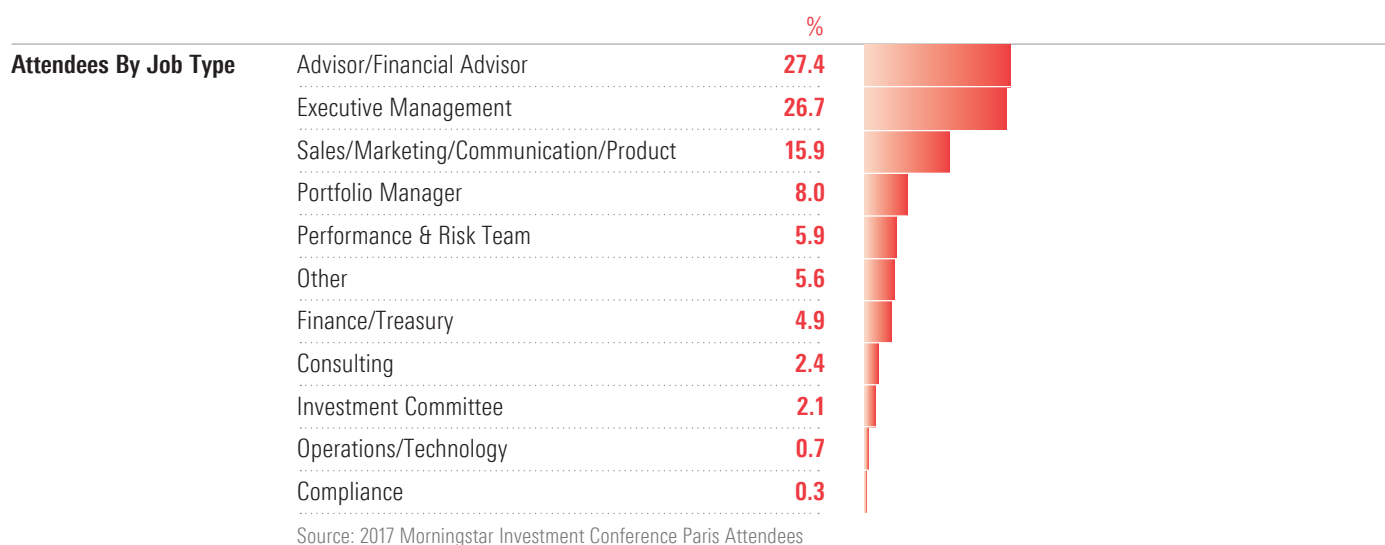
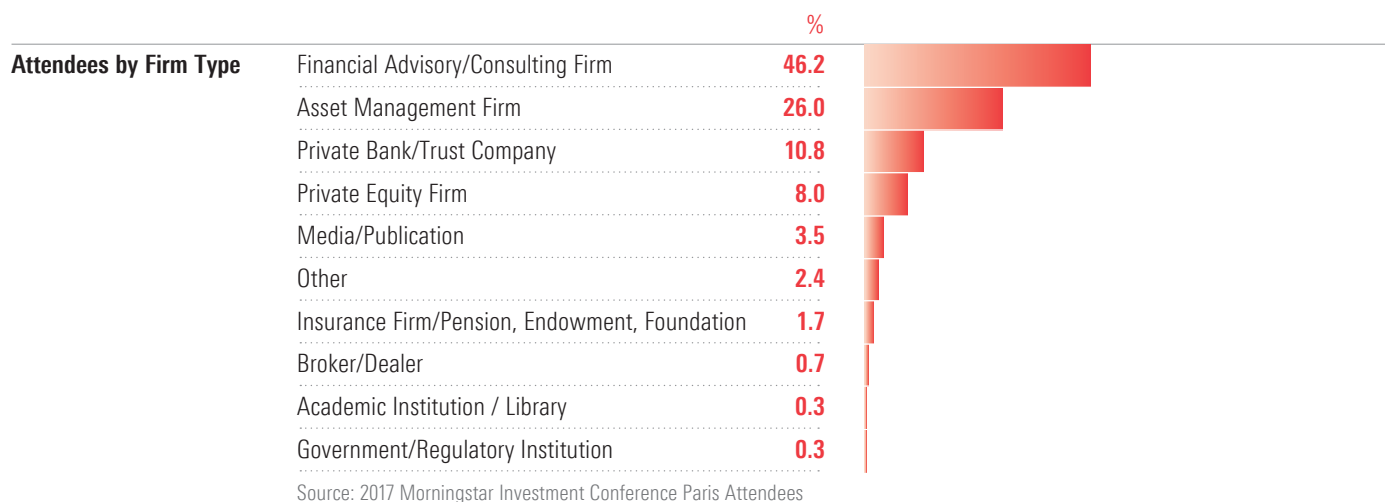
your firm's visibility to reach a captive audience of experienced financial professionals, as evidenced by these statistics from the 2017 conference. 100% of conference delegates were satisfied with MIC Paris.



# 2017 Conference Statistics—Attendees Breakdown

Exhibiting at the Morningstar® Investment Conference is one of the most effective ways to reach those who make decisions about buying your products and services. Sponsoring the conference maximizes

your firm's visibility to reach a captive audience of experienced financial professionals, as evidenced by these statistics from the 2017 conference. 100% of conference delegates were satisfied with MIC Paris.



# Sponsorship

---

## Principal

As the principal sponsor of the 2018 Morningstar Investment Conference, your company has the opportunity to be a key part of the attendee experience throughout the conference. Your sponsorship gives you prime placement in the exhibit hall, a double-sized booth space, and extra passes for your exhibiting staff. As the principal sponsor, your company will reach all attendees using laptops and mobile devices via mobile app. Your sponsorship includes one banner ad in the mobile app and one push notification to mobile app users during the conference.

You will be also entitled to choose two additional opportunities at no extra cost, which include the possibility to provide a branded pen or notebook for all attendees, to sponsor Coffee-break, Lunch and include other promotional items in the Conference Room. In addition to your on-site presence, advertising exposure includes logo placement in preconference marketing materials, including email and direct mail, and on the conference website.

---

## Lead

As one of three lead sponsors of the 2018 Morningstar Investment Conference, your company will be visible to attendees on several different fronts. All attendees will receive conference materials upon registration. As a lead sponsor, you have the option to provide a branded pen or notebook for all attendees, or to sponsor a coffeebreak or lunch.

Advertising exposure includes logo placement in preconference marketing materials, including email and direct mail, and on the conference website. As one of five exhibitor sponsors, your company will exhibit in a booth place of at least 3m x 2m. Advertising exposure includes logo placement in preconference marketing materials, including email and direct mail, and on the conference website.

---

## Exhibitor

As one of five exhibitor sponsors, your company will exhibit in a booth place of at least 3m x 2m. Advertising exposure includes logo placement in preconference marketing materials, including email and direct mail, and on the conference website.

# Sponsorship Benefits Overview

Sponsorship gives you the opportunity to have your logo included in 2018 Morningstar® Investment Conference marketing, including the website, brochure, direct mail, and promotional emails.

**Register now to ensure maximum exposure.**

	Principal	Lead	Exhibitor
<b>Number Available</b>	①	②	③
Listing as a sponsor on the Morningstar Investment Conference website, with your company logo and a link to your website	✓	✓	✓
Company logo (appropriately tiered) on all Morningstar Investment Conference marketing materials, including — emails sent by Morningstar to qualified recipients, advertising placed in financial publications, postcards	✓	✓	✓
Exclusive mobile app sponsor	✓		
Delegate passes for key clients (must meet Morningstar attendees criteria)	⑮	⑩	⑤
Conference passes for company representatives, including access to the sessions	②	③	②
Delegate list with attendee details, as permitted by data-protection rules	✓ 2 weeks before conf.	✓ 2 days before conf.	✓
Exhibition booth place (at least 3x2 m) (provided by each Sponsor/Exhibitor)	✓ 6x3 m high traffic	✓ preferred place	✓
Logo on conference signage	✓	✓	✓
Logo included in looped, large-screen presentation	✓	✓	✓
Patronage announcement during the welcoming remarks	✓	✓	
Choose from the following: notepad, sponsorship of buffet luncheon, breakfast/breaks, pens, water bottles, promotional item (Choose one)	✓ Choose 2	✓ Choose 1	
Distribution of literature in delegate bag	✓	✓ €2,000	
Distribution of promotional item in delegate bag	✓		
Literature drop in room	✓		
<b>2018 Package Price (local VAT not included)</b>	<b>€16,000</b>	<b>€12,500</b>	<b>€7,500</b>



MORNINGSTAR®

Morningstar France  
52, rue de la Victoire  
75009 Paris, France  
+33 1 55 50 13 00