

# Morningstar® Investment Conference 2018 Sponsorship Opportunities



# Morningstar Investment Conference

## 24 May 2018

International Convention Centre, Sydney

The Morningstar Investment Conference is a one-day event driven by Morningstar's commitment to provide advisers and institutions with the knowledge, resources and insight to better serve their clients. Now in its 11th year, the Morningstar Investment Conference is one of the longest running events of its kind, attracting one of the largest financial professional audiences in Australia.

### **An Event that Continues to Grow**

The conference was first held in 2007, and since then has grown in strength, establishing itself as the 'must-attend' event in the industry calendar. Attendee numbers have grown year on year, with more than 600 attendees in 2017, offering you an unparalleled opportunity to engage with your client base.

### **About the Delegates**

The conference attracts a strong audience made up of decision makers and influencers including:

- ▶ AFSL research heads
- ▶ AFSL Investment Committees
- ▶ AFSL Heads
- ▶ Boutique Financial Planning Practice Owners
- ▶ Advisers and paraplanners
- ▶ Brokers

Feedback from the 2017 event shows delegates' great enthusiasm for the content of the conference and the value that the sponsors add to the event.

- ▶ 88% of attendees rated their overall conference satisfaction as very good to excellent
- ▶ 91% of attendees rated the event above average when compared to comparable industry events
- ▶ 84% of attendees rated the quality of the sponsorship as very good to excellent



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### Highly Satisfied Sponsors

13 out of 14 sponsors of the 2016 event returned to sponsor again in 2017 and 8 sponsors in 2017 had sponsored the event in three or more of the previous years.

Feedback from the 2017 event shows that sponsors saw the event as a beneficial investment.

- ▶ 100% of sponsors rated the number of attendees as very good to excellent
- ▶ 83% of sponsors rated their overall conference satisfaction as very good to excellent
- ▶ 100% of sponsors said they would consider sponsoring again next year.

### Benefits of Sponsorship

- ▶ Pre-conference marketing efforts give your brand repeated and significant exposure to Morningstar's comprehensive database of financial advisers and brokers
- ▶ Access an audience of decision makers
- ▶ A rare opportunity for face to face business development with one of Australia's largest communities of financial professionals
- ▶ Get your brand and marketing material directly into the hands of your target audience

### Sponsorship of the event is highly recommended for:

- ▶ Fund Managers
- ▶ Self-Managed Super Fund administration providers
- ▶ Platforms

“Excellent client to product issuer ratio.”

“Great connection and networking opportunity for our sales team.”

“I really enjoyed interacting with the sponsor exhibition booth holders, it's really good to be able to make connections for my firm.”



## Sponsorship Overview

	<b>Principal</b> <b>\$35,000 + GST</b> (1 opportunity)	<b>Lead</b> <b>\$20,000 + GST</b>	<b>Major</b> <b>\$15,000 + GST</b>
<b>Pre-Conference Event</b>			
Exclusive sponsor of the pre-conference event at Morningstar offices for key clients the day prior to the conference	Yes	No	No
Inclusion in a session at the pre-Conference event	Yes	No	No
Inclusion in pre-Conference dinner with Morningstar's key clients	Yes	No	No
<b>Pre-Conference Opportunities</b>			
Listing as a major sponsor on the Morningstar Investment Conference website, including company overview, logo and a link to your website	Yes	Yes	Yes
Company logo on all pre-event marketing including email campaigns and print advertisements	Yes	Yes	Yes
Recognition during the opening and closing remarks	Yes	Yes	Yes
Preferred pricing for additional registrations	Yes	Yes	Yes
Advertising on Morningstar.com.au	Yes (\$6,000 value)	Yes (\$4,500 value)	Yes (\$3,000 value)
Sponsor eDM sent by Morningstar to registered delegates one week before the event. (Copy to be approved by Morningstar)	Yes	No	No
<b>Conference Opportunities</b>			
Sponsor exhibition booth (Positioned in either the conference room or grand foyer)	Yes	Yes	Yes
Conference registrations – maximum 2 staff and 6 clients at your own branded table	Yes (2 tables/16 places)	Yes (2 tables/16 places)	Yes (1 table/8 places)
Opportunity to provide advertising in official handbook distributed to all delegates	Yes	Yes	No
Logo inclusion in official handbook	Yes	Yes	Yes
Logo on holding slides at commencement and conclusion of the day and at break times	Yes	Yes	Yes
Competition promoted by Morningstar at the event. Prize presented at the close of day.	Yes	Yes	Yes
Consenting delegate list	Yes	Yes	No

Become a Principal, Lead or Major sponsor and access the additional opportunities at a discounted rate:

Sponsorship + 1 opportunity = 15% off the opportunity

Sponsorship + 2 opportunities = 20% off the opportunities

## Additional Sponsorship Opportunities

### Networking Drinks

**\$9,000 + GST**

Be the sponsor of the conference's closing networking drinks which includes a premium bar. In 2017, the majority of attendees participated in the networking drinks.

### Lanyard (per delegate) Sponsor

**\$8,000 + GST**

With over 600 delegates in attendance, sponsoring the conference lanyards will provide you with extensive onsite brand exposure. As an exclusive sponsor, your logo will concurrently appear in full colour along the full length of the lanyard

### Coffee Cart

**\$6,000 + GST**

Be the exclusive sponsor for the coffee cart, where premium coffee is served to attendees, during all breaks. As the sponsor of the dedicated coffee cart, your logo will appear prominently on the coffee machine and the cups. In 2017, over 600 cups of coffee were served to attendees.

### Mobile App

**\$5,000 + GST**

Sponsor the dedicated conference mobile app. Put your brand front and centre with banner ads and send out alerts and updates to delegates. In 2017, 79% of all attendees downloaded the app.

### Mobile Phone/Tablet Charging Station

**\$3,000 + GST**

Mobile phone/tablet charging stations allow you to reach attendees while they charge their phones or tablets. The charging station will be branded with your company logo and it's a great way to promote your business.

### Wi-Fi

**\$2,000 + GST**

Help all conference attendees get connected at the conference as the official Wi-Fi sponsor



# Confirmation Slip

To confirm your agreement as a sponsor for the Morningstar Investment Conference 2018, please sign below where indicated and fax to +61 2 9276 4545 or email to [peter.williamson@morningstar.com](mailto:peter.williamson@morningstar.com)

## Please indicate your level of sponsorship

Principal                       Lead                               Major  
\$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_

Networking Drinks       Coffee Cart                       Lanyard (per delegate)  
\$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_

Mobile App                       Mobile/Tablet Station       Wi-Fi  
\$ \_\_\_\_\_ \$ \_\_\_\_\_ \$ \_\_\_\_\_

Full Name \_\_\_\_\_

Position \_\_\_\_\_

Company Name \_\_\_\_\_

Email Address \_\_\_\_\_

ABN \_\_\_\_\_

Address \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Please contact Peter Williamson on +61 2 9276 4422 on [peter.williamson@morningstar.com](mailto:peter.williamson@morningstar.com) with any enquiries.  
FULL PAYMENT WILL BE REQUIRED PRIOR TO THE EVENT.

**Morningstar Investment Conference**

International Convention Centre, Sydney

14 Darling Drive

Sydney NSW 2000

[www.morningstarinvestmentconference.com.au](http://www.morningstarinvestmentconference.com.au)



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