

**Morningstar[®]
Investment Conference**

**Milan
2018**

Sponsorship Kit

Morningstar® Investment Conference

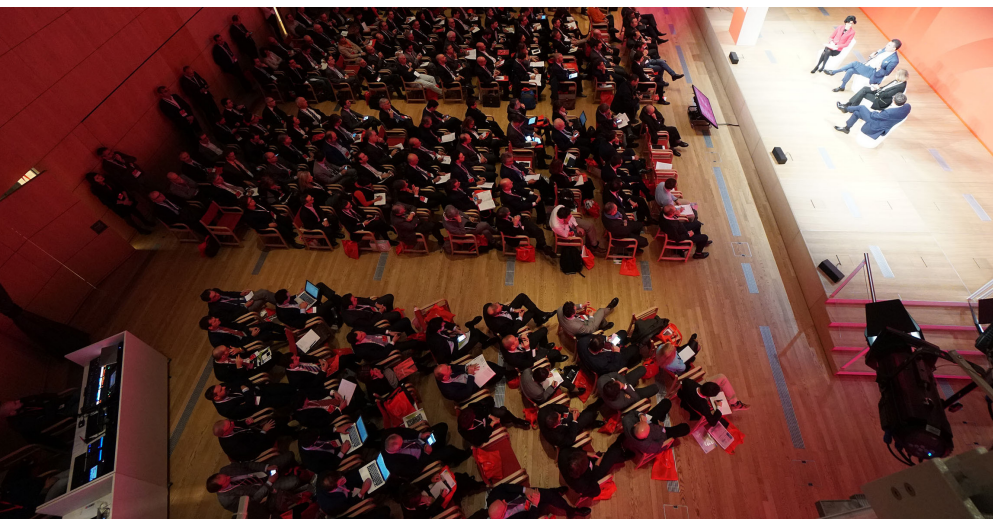
Milan 2018

November 8, 2018
UniCredit Pavilion
Piazza Gae Aulenti 10, 20154
Milano

For more information on
sponsorship opportunities,
please contact:
Audience Team at
audience@morningstar.com
+39 02 30301294

Our one-day conference in Milan seeks to showcase cutting-edge investment research and financial innovations from industry experts. The fifth annual Morningstar® Investment Conference 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 field and discussion rounds are hosted by our analysts and provide for an interactive experience. Breaks allow for ample networking opportunities in a professional setting.

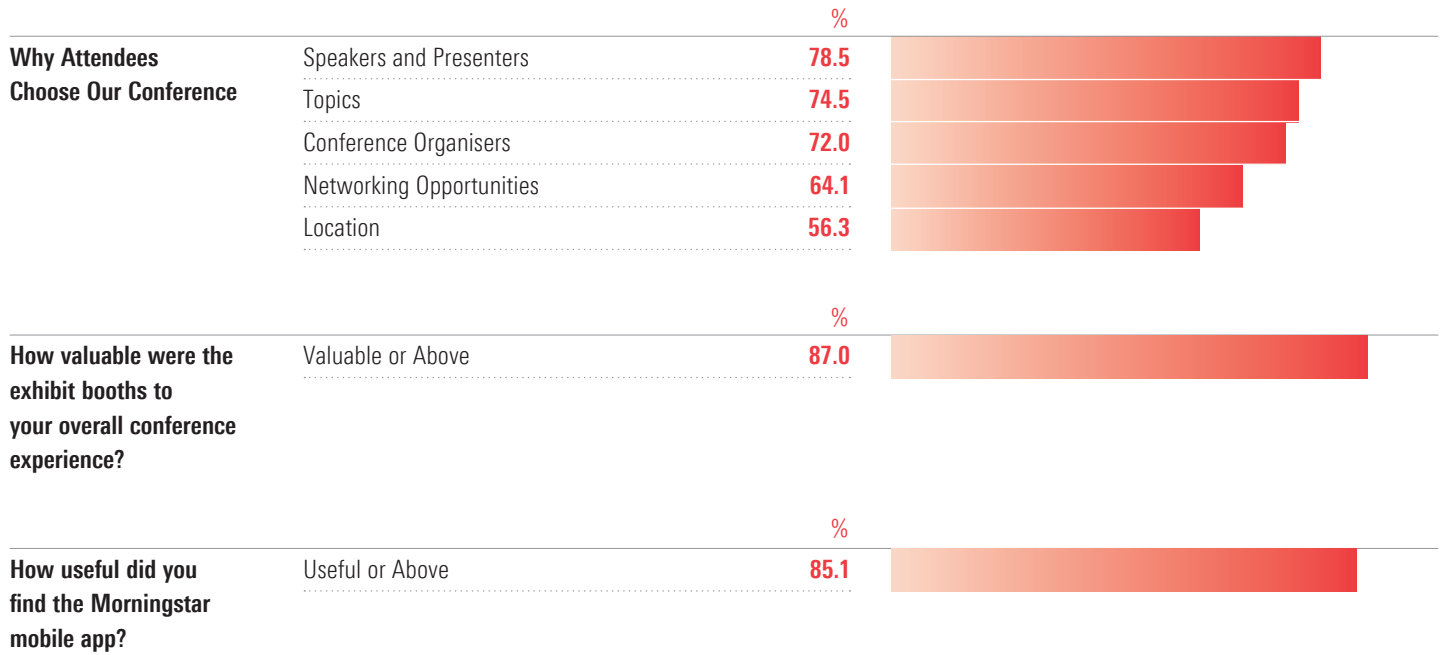
Morningstar will be reaching out to attract advisors and institutional investors in Italy. We expect to host more than 300 attendees. Our clients and prospects base span the entire spectrum of investors, including insurance firms, private banks, wealth managers, pension funds, family offices and fund firms. The Morningstar Marketing Team will send email invitations to a qualified list of over more than 10.500 contacts and personal invitations to selected names are an effective way to reach our target audience.



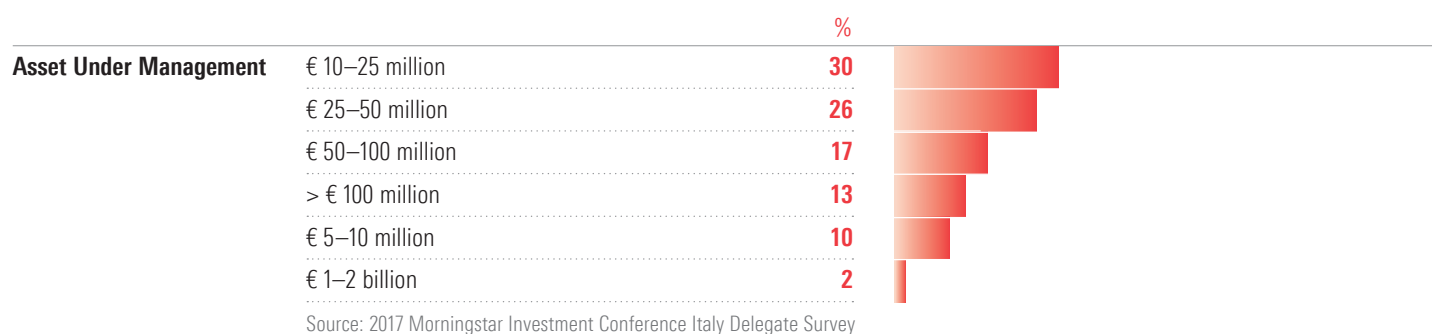
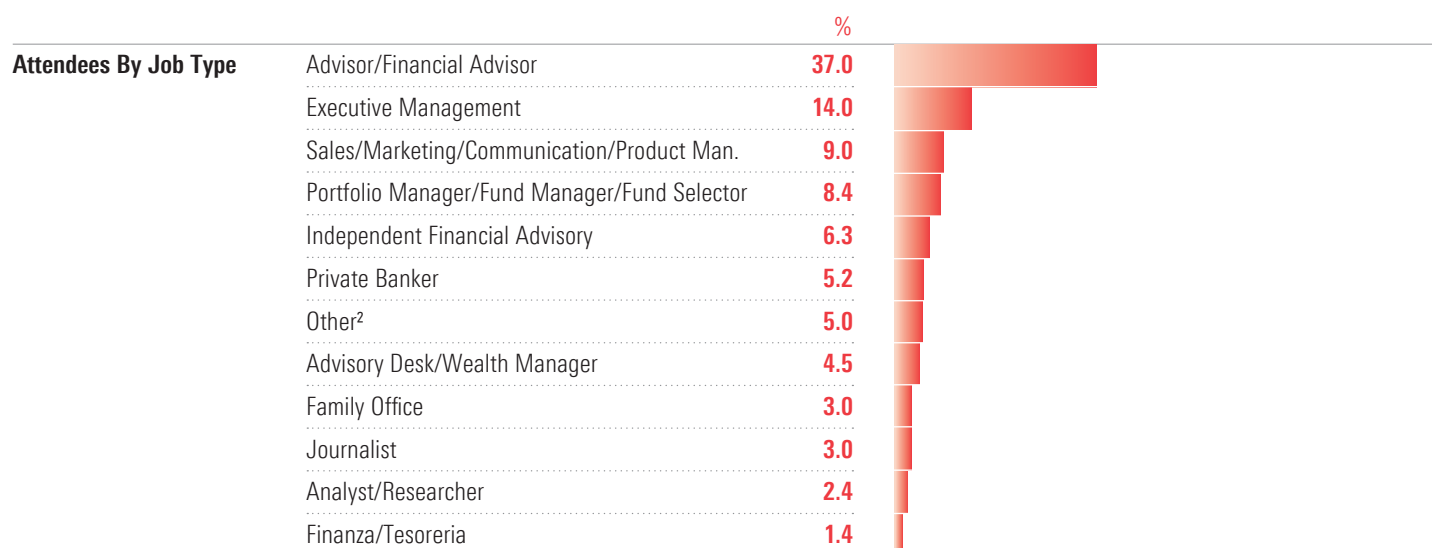
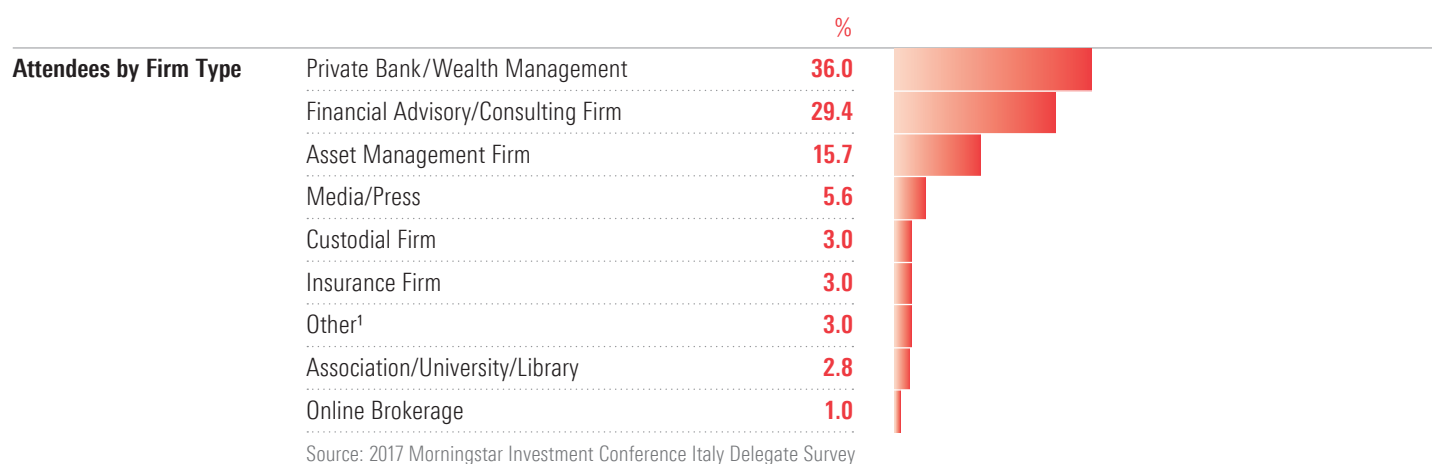
2017 Conference Statistics—Delegates

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. 91% of conference delegates were satisfied with MIC Italy.



2017 Conference Statistics—Attendees Breakdown



¹Other includes trading, hedge fund, and financial industry services.

²Other includes banking and academic professionals.

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, 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. Your logo will be included on mobile app promotions and signage.

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 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 coffee-break or lunch.

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

	Principal	Lead	Exhibitor
Number Available	1	3	5
Sponsor listing on the Morningstar Investment Conference website, with your company logo and a link to your website	✓	✓	✓
Company logo, appropriately tiered, on Morningstar Investment Conference marketing materials, including emails sent by Morningstar to qualified recipients and APP	✓	✓	✓
Exclusive mobile app sponsor	✓		
Delegate passes for key clients <small>(must meet Morningstar attendee criteria)</small>	15	10	5
Conference passes for company representatives, including access to the sessions	5	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 3m x 2m) <small>(provided by each Sponsor/Exhibitor)</small>	✓ 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 <small>(Supply is excluded)</small>	✓ choose 2	✓ choose 1	
Distribution of promotional item in delegate bag	✓	✓	
Literature drop in conference room	✓		
Online branding campaign <small>(6000 euros of contract value to run during the month of the conference upon availability)</small>	✓		
2018 Package Price (local VAT not included)	€18.000	€12.000	€6.000



MORNINGSTAR®

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