



National Association of
Active Investment Managers

2017

Sponsorship Opportunities

The National Association of Active Investment Managers

(NAAIM) was formed in 1989 as a non-profit association of investment professionals who use active investment strategies to manage client portfolios. These strategies seek to enhance the portfolio's risk/reward relationship by positioning assets to benefit from current market conditions and reduce the risk of market downturns. While the investment strategies used by our members are diverse, technical analysis and computer-based trading systems play an important role.

Over the years, NAAIM has grown to include representatives from roughly 200 member firms nationwide and has become the optimal resource for active managers. Members range from small regional firms to large national firms with more than \$1 billion in assets under management, with overall assets managed by association members in excess of \$30 billion.

NAAIM IS AN EXCEPTIONAL MEANS FOR SPONSOR FIRMS TO REACH INNOVATIVE, LEADING-EDGE MONEY MANAGERS.

Many of the innovative investment tools available today for active managers were created in collaboration with NAAIM members. The NAAIM membership has been among the first to support new investment vehicles and innovations, from mutual funds and ETFs to trust companies; analytical, software and trading platforms; leading edge service providers, and more.

At NAAIM we see our sponsors as an invaluable resource. A resource we make available to the NAAIM members throughout the year, not just at one conference or event. Sponsor firms are offered a range of benefit-packed levels from National Sponsor to Innovation Sponsor to reach the influential NAAIM membership. These opportunities are detailed on the following Sponsor Benefit Matrix.

We welcome old and new sponsors who offer our membership the tools they need to grow their firms and succeed.

To become a 2017 NAAIM Sponsor, simply complete the application at the end of this form and return it to NAAIM with your payment. We will follow up with a prompt contact to help you get the most benefit from your sponsorship. For more information on NAAIM and sponsorship opportunities, contact NAAIM directly at 888-261-0787 or visit our website at www.naaim.org.

SPONSOR LEVELS

- ◆ National Sponsor
- ◆ Platinum Sponsor
- ◆ Gold Sponsor
- ◆ Silver Sponsor
- ◆ Innovation Sponsor

Annual (Year-long) Sponsor Benefits	National \$50,000	National Co-Sponsor \$30,000	Platinum \$21,000	Gold \$10,750	Silver \$6,500	Innovation \$1,250
Sponsors Limited to:	1	2	4	6	Unlimited	Unlimited
Associate Member Dues: Includes Complimentary Membership for 5 Firm Employees	*	*	*	*	*	
Continuous Year-Round Exposure to Website Visitors (NAAIM home page logo, link, sponsor recognition)	*	*	*	*	*	
Webinar Presentation, promoted via email by NAAIM to more than 5000+ contacts	2 / yr	1 / yr	1 / yr	Add'l Cost	Add'l Cost	
Year-Round Access to NAAIM Membership List	*	*	*	*	*	
NAAIM Website: Up to 200-Word Sponsor Profile with Logo and Website Link	*	*	*	*	*	
Access to NAAIM Community, Exclusive Access to Members-Only and Online Content	*	*	*	*	*	
Guest Blog Posts on NAAIM Speaks	4 / yr	2 / yr	2 / yr	Add'l Cost		
Sponsored Content Post with Logo and Website Link on NAAIM News	4 / yr	2 / yr	2 / yr	Add'l Cost		
First Right of Refusal for New Sponsor Opportunities	Exclusive					
NAAIM Board Of Directors Meeting Participation	Exclusive					
Chair of Sponsorship Advisory Committee	Exclusive	Shared / Rotating				
Active Manager Newsletter Advertising (4 issues)	4 Issues: 1 Full-page Ad	2 Issues – Rotating /1-page Ad	2 Issues: 1-page Ad (Pre-Conference Issues)	1-page Ad (Pre-Conference Issue)	Add'l Cost	Add'l Cost
Logo Displayed in Bi-Weekly NAAIM News E-Digest	Exclusive	Rotating	Rotating			
NAAIM Founders Award Competition — 1st place sponsor	Exclusive					

Uncommon Knowledge Conference Benefits	National Sponsor	National Co-Sponsor	Platinum	Gold	Silver	Innovation
Exhibit Space — 6' Exhibit Tables with Draping Included	2 Tables + Preferred Booth Placement	1 Table each + Preferred Booth Placement	1 Table each	1 Table each	1 Table each	1 Table Tuesday only
Conference Registrations	4	3 each	2 each	2 each	2 each	1 each
Guest Passes for Non-Member RIAs**	5 (\$3,000 value)	3 (\$1,800 value) each	2 (\$1,200 value)	1 (\$600 value)		
Keynote Speaker*	Exclusive	Add'l Cost (\$5,000)	Add'l Cost (\$5,000)			
Sponsor Bonus Sessions	1 Main Session Audience – 15-minute opportunity	1 each: Main Session Audience – 15-minute opportunity	1 each: Main Session Audience – 15-minute opportunity	1 each: Breakout Room – 45-minute opportunity		
Welcome Reception Sponsorship			Shared w / Platinums			
New Member Orientation and Breakfast	Exclusive	Shared				
Monday Dinner Event – National Sponsorship	Exclusive	Shared				
Tuesday Party Sponsorship			Shared w / Platinums			
Breakfast and Break Sponsorship				Shared w / Golds		
Shark Tank Sponsorship	Add'l Cost	Add'l Cost	Add'l Cost	Add'l Cost		
Vendor Directory Ad	2 Pages	1 Page each	1 Page	Add'l Cost	Add'l Cost	Add'l Cost
Vendor Profile in Print Conference Guide	2 Pages	1 Page each	1 Page	Add'l Cost	Add'l Cost	Add'l Cost
On-Site Signage with Logo	Conference Banner plus Sponsored Events	Conference Banner plus Sponsored Events	Sponsored Events	Sponsored Events		
Golf Classic Foursome	2 Foursomes	1 Foursome each	1 Fishing or 1 Golf Foursome	Add'l Cost (\$1,500)	Add'l Cost (\$1,500)	
Golf Classic Signage	Lead Recognition	Shared Lead Recognition	Event Recognition	Add'l Cost	Add'l Cost	
Fishing Sponsor (up to 2 sponsors)	Add'l Cost	Add'l Cost	1 Fishing or 1 Golf Foursome	Add'l Cost (\$1,000)	Add'l Cost (\$1,000)	
Pre-Conference Recognition	*	Active Manager Newsletter, NAAIM News, plus Conference Brochure and Emails			*	
Lunch Introduction to Full Conference Audience	*	*	*	*	*	*
Access to Attendee List (one pre-conference and post-conference mailing; no emails)	*	*	*	*	*	*
Mobile Conference App Custom Listing	*	150-word Sponsor Profile, with links to up to three (3) websites, plus Logo and links to any sponsored sessions				*

Outlook Conference Benefits	National Sponsor	National Co-Sponsor	Platinum	Gold	Silver	Innovation
Exhibit Space	1 Table + Preferred Booth Placement	1 Table each	1 Table each			
Conference Registrations	4	3 each	2 each			
Guest Passes for Non-Member RIAs**	3 guests	2 guests each	1 guest each			
Conference Speaker	1-hour Sponsor is responsible for speaker fee, travel & lodging					
Lunch Signage	Exclusive	Shared				
Breakfast and Break Sponsorship Signage			Shared w / Platinums			
Vendor Directory Ad	1 Page	1 Page each	1 Page			
Vendor Profile in Print Conference Guide	1 Page	1 Page each	1 Half-page Ad			
Pre-Conference Recognition	Active Manager Newsletter, NAAIM News, plus Conference Brochure and Emails					
Lunch Introduction to Full Conference Audience	*	*	*			
Access to Attendee List (one pre-conference and post-conference mailing; no emails)	*	*	*			
On-Site Signage with Logo	Conference Banner plus Sponsored Events	Conference Banner plus Sponsored Events	Sponsored Events			
Mobile Conference App	*	150-word Sponsor Profile		*		

Regional Workshop Benefits	National Sponsor	National Co-Sponsor	Platinum	Gold	Silver	Innovation
Workshops	2	1 Workshop each	\$1,500 per Workshop	\$1,500 per Workshop	\$1,500 per Workshop	\$1,500 per Workshop (Membership Required)
First Right of Refusal for Participation at New Workshop Locations	Exclusive					
Panel Moderator	Exclusive	Shared / Rotating				
Panel Participation or Sponsor Presentation	*	*	*	*	*	*
Postcard with Logo to approx. 1,500 RIAs, 150-mile Radius of Event	*	*	*	*	*	*
Up to Two (2) Sponsor Representatives Can Attend at No Additional Cost	*	*	*	*	*	*

* Included with Sponsorship Level.

** Guest pass restrictions apply. Contact NAAIM for more information.

Mark your sponsorship selections...

SPONSORSHIP LEVEL

<input type="checkbox"/> National Sponsor	\$50,000 Exclusive
<input type="checkbox"/> National Co-Sponsor	\$30,000 per firm
<input type="checkbox"/> Platinum Sponsor	\$21,000
<input type="checkbox"/> Gold Sponsor	\$10,750
<input type="checkbox"/> Silver Sponsor	\$6,500
<input type="checkbox"/> Innovation Sponsor* — Restricted availability and exposure	\$1,250

* The Innovation Sponsorship is not available to firms providing investment vehicles, custody services, trusteeship services and/or mutual funds to attendees.

ADDITIONAL CONFERENCE OPPORTUNITIES

<input type="checkbox"/> Golf Classic foursome sponsorship and recognition at the Classic, includes one to two members from your firm in the foursome.	\$1,500 per foursome Number of foursomes: _____
<input type="checkbox"/> Fishing expedition sponsorship (Uncommon Knowledge), includes one to two members from your firm.	\$1,000
<input type="checkbox"/> Shark Tank Sponsorship (Limit – two firms)	\$1,500 per firm
<input type="checkbox"/> Additional attendee registrations from your firm	\$600 per person
<input type="checkbox"/> Full-page ad in the conference vendor directory	\$500
<input type="checkbox"/> Half-page ad in the conference vendor directory	\$250

USE ONE REGISTRATION FORM FOR ALL SPONSORSHIP INFORMATION. PLEASE PRINT

Company Name _____

Name _____ Title _____ Email _____

Name _____ Title _____ Email _____

Individual to contact regarding Conference information: Attending: Yes No

Name _____ Title _____ Email _____

Company Address _____

City _____ State _____ Zip _____

Phone _____ Fax _____

Attendees: (National Sponsorship includes registration for four attendees; National Co-Sponsors receive three attendee registrations each; Platinum, Gold and Silver Sponsorships include two attendees. Innovation Sponsors receive one attendee registration. Additional attendees \$600 per person.)

1. Name _____ Title _____ Email _____

2. Name _____ Title _____ Email _____

3. Name _____ Title _____ Email _____

If there will be more attendees, please attach a list of their names, titles and email addresses.

Payment Method: MasterCard Visa AMEX Discover Check (Please make checks payable to NAAIM)

Credit card and billing address, if different from company address:

Address _____

City _____

State _____ Zip _____

Credit Card number _____

Expiration Date _____

CARDHOLDER'S SIGNATURE

Total amount enclosed or to be charged: \$ _____

Mail or Email registration with payment to:
 NAAIM
 6732 W. Coal Mine Ave., #446
 Littleton, CO 80123
 Phone 303-979-1280 • Fax: 719-309-1290
 Email: info@naaim.org
 www.naaim.org

For more information: Visit www.naaim.org, or contact Susan Truesdale at 888-261-0787 or info@naaim.org