



**National Association of  
Active Investment Managers**

# 2022 Sponsorship Opportunities

## **33 Years of Leadership in Active Investment Management**

Managing in excess of \$15 billion in client assets, the National Association of Active Investment Managers (NAAIM) membership ranges from long-established, multi-billion-dollar firms to new advisors attracted by the potential of active investment management to create viable long-term portfolios for their clients.

Through its thought-provoking conferences, white paper competition, manager sentiment indicator, manager visibility created by the NAAIM Investing Strategy Competition, and on-going exchange of ideas, NAAIM has attracted investment advisors open to new concepts and better ways of managing client assets since 1989. NAAIM advisors actively seek innovative investment vehicles and approaches that offer better trading opportunities and alpha return potential.

**NAAIM** is not your ordinary investment advisor group. Our members believe in risk management in an uncertain world. They look beyond passive asset allocation, modern portfolio theory and mainstream investment approaches to offer clients capital appreciation combined with capital preservation.

If you are looking for advisors and money managers with the staying power to make it beyond the next bear market; firms with the potential to grow assets under management in all investment climates; financial innovators – NAAIM sponsorship will provide you with the introduction you need.

With NAAIM, you can go beyond the sale to explore new product

ideas. Many of the innovative investment tools available today for active managers were created in collaboration with NAAIM members.

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 to reach the influential NAAIM membership. These opportunities are detailed on the following Sponsor Benefit Matrix and application form.

For more information on NAAIM and sponsorship opportunities, contact NAAIM directly at **888-261-0787** or visit our website at [www.naaim.org](http://www.naaim.org).

| Annual (Year-long) Sponsor Benefits   | Platinum<br>\$22,500                           | Gold<br>\$11,500                    | Silver<br>\$8,000 | Innovation<br>\$1,500 |
|---|--|-------------------------------------|-------------------|-----------------------|
| Sponsor Firms Limited to:   | 4  | 4                                   | 6                 | 6                     |
| Associate Member Dues:<br>Includes Complimentary Membership for 5 Firm Employees                        | ✓  | ✓                                   | ✓                 |                       |
| Continuous Year-Round Exposure to Website Visitors<br>(NAAIM home page logo, link, sponsor recognition) | ✓  | ✓                                   | ✓                 |                       |
| Webinar Presentation, promoted via email<br>by NAAIM to more than 5000+ contacts                        | 2 / yr   | 1/yr                                | Addt'l Cost       |                       |
| Year-Round Access to NAAIM Membership List  | ✓  | ✓                                   | ✓                 |                       |
| NAAIM Website: Up to 200-Word Sponsor Profile<br>with Logo and Website Link                             | ✓  | ✓                                   | ✓                 |                       |
| Access to NAAIM Community, Exclusive Access to Members-Only<br>and Online Content                       | ✓  | ✓                                   | ✓                 |                       |
| NAAIM Speaks Blog Advertisement Insert  | 2 / yr   | Addt'l Cost                         |                   |                       |
| Sponsored Content Post with Logo and<br>Website Link on NAAIM News                                      | 3 / yr   | Addt'l Cost                         |                   |                       |
| Active Manager Newsletter Advertising (4 issues)  | 2 Issues: 1-page Ad<br>(Pre-Conference Issues) | 1-page Ad<br>(Pre-Conference Issue) | Addt'l Cost       | Addt'l Cost           |

| Uncommon Knowledge Conference Benefits  | Platinum  | Gold  | Silver                | Innovation              |
|---|---|---|-----------------------|-------------------------|
| Exhibit Space — 6' Exhibit Tables<br>with Draping Included                                      | 1 Table each  | 1 Table each  | 1 Table each          | 1 Table<br>Tuesday only |
| Sponsor Firm Attendee Passes  | 2 each  | 2 each  | 2 each                | 1 each                  |
| Guest Passes for Non-Member RIAs **   | 2 (\$1,200 value)   | 1 (\$600 value)                                     |                       |                         |
| Keynote Speaker *   | Addt'l Cost (\$5,000)   |   |                       |                         |
| Sponsor Bonus Sessions  | 1 each:<br>Main Session Audience –<br>15-minute opportunity                                   | 1 each:<br>Breakout Room –<br>45-minute opportunity |                       |                         |
| NAAIM Investing Competition Finals Welcome Reception  | Addt'l Cost   | Addt'l Cost   | Addt'l Cost           |                         |
| New Member Welcome Breakfast  | Shared w/Platinums  |   |                       |                         |
| Tuesday Party Sponsorship   | Shared w/Platinums  |   |                       |                         |
| Breakfast and Break Sponsorship   |   | Shared w/Golds                                      |                       |                         |
| Vendor Directory Ad in Conference Guide   | 1 Page  | Addt'l Cost   | Addt'l Cost           | Addt'l Cost             |
| On-Site Signage with Logo   | Sponsored Events  | Sponsored Events                                    |                       |                         |
| Golf Classic Foursome   | 1 Golf Foursome   | Addt'l Cost (\$1,500)                               | Addt'l Cost (\$1,500) |                         |
| Golf Classic Signage  | Event Recognition   | Addt'l Cost   | Addt'l Cost           |                         |
| Pre-Conference Recognition  | Active Manager Newsletter, NAAIM News, plus Conference Brochure and Emails                    |   |                       |                         |
| Lunch Introduction to Full Conference Audience  | ✓   | ✓   | ✓                     | ✓                       |
| Access to Attendee List<br>(One pre-conference and post-conference mailing; no emails)          | ✓   | ✓   | ✓                     | ✓                       |
| Mobile Conference App Custom Listing  | 150-word Sponsor Profile, with link to website, plus Logo and links to any sponsored sessions |   |                       |                         |
| Conference App Banner Ad (scrolling)  | ✓   | \$500   | \$500                 | \$500                   |
| Monday Dinner Event   | \$10,000  | \$10,000  | \$10,000              |                         |
| NAAIM Founders Award — Introduction of winner<br>in general session and signage (Limit 2 firms) | \$2,500   | \$2,500   | \$2,500               |                         |

| Outlook Conference Benefits<br>(Included with Platinum Sponsorship)  | Platinum              | Gold | Silver | Innovation |
|--|-----------------------|------|--------|------------|
| Exhibit Space  | 1 Table each          |      |        |            |
| Sponsor Firm Attendee Passes   | 2 each                |      |        |            |
| Guest Passes for Non-Member IRAs **  | 1 guest each          |      |        |            |
| Keynote Conference Speaker   | Addt'l Cost (\$3,000) |      |        |            |
| Pre-Conference Recognition<br>(Active Manager Newsletter, NAAIM News, plus Conference<br>promotional emails and materials) | ✓                     |      |        |            |
| Lunch Introduction to Full Conference Audience   | ✓                     |      |        |            |
| Mobile Conference App Custom Listing<br>(Description — 200 word; Logo; link to company website)                            | ✓                     |      |        |            |
| Access to Attendee List<br>(One pre-conference and post-conference mailing; no emails)                                     | ✓                     |      |        |            |
| On-Site Signage with Logo  | ✓                     |      |        |            |

✓ Included with Sponsorship.

\* Sponsor is responsible for speaker fee, travel and lodging. Speaker must be approved by Agenda Committee.

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

Mark your sponsorship selections...

### SPONSORSHIP LEVEL

|   |           |
|---|-----------|
| <input type="checkbox"/> Platinum Sponsor   | \$ 22,500 |
| <input type="checkbox"/> Gold Sponsor   | \$ 11,500 |
| <input type="checkbox"/> Silver Sponsor   | \$ 8,000  |
| <input type="checkbox"/> Innovation Sponsor* — Restricted availability and exposure | \$ 1,500  |

\* 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"/> Uncommon Knowledge Monday Dinner Event  | \$ 10,000   |
| <input type="checkbox"/> NAAIM Founders Award Competition Sponsor (Limit 2 firms)  | \$ 2,500 per firm                                   |
| <input type="checkbox"/> Uncommon Knowledge Keynote Speaker (Platinum Sponsors only)   | \$ 5,000  |
| <input type="checkbox"/> Outlook Keynote Speaker (Platinum Sponsors only)  | \$ 3,000  |
| <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<br>Number of foursomes: _____ |
| <input type="checkbox"/> Additional attendee registrations from your firm (Uncommon Knowledge only)  | \$ 600 per person                                   |
| <input type="checkbox"/> Conference Banner ad – Scrolling (Uncommon Knowledge)   | \$ 500  |
| <input type="checkbox"/> Full-page ad in the conference vendor directory (Uncommon Knowledge only)   | \$ 500  |
| <input type="checkbox"/> Half-page ad in the conference vendor directory (Uncommon Knowledge only)   | \$ 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:** Platinum, Gold and Silver Sponsorships include two attendees at Uncommon Knowledge and Outlook Conferences. Innovation Sponsorships include one attendee at Uncommon Knowledge Conference. (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 \_\_\_\_\_ CVV \_\_\_\_\_

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: 720-749-1367  
Email: [info@naaim.org](mailto:info@naaim.org)  
[www.naaim.org](http://www.naaim.org)

**For more information:** Visit [www.naaim.org](http://www.naaim.org),  
or contact Susan Truesdale at 888-261-0787 or  
[info@naaim.org](mailto:info@naaim.org)