



PAICR | THE ASSET
MANAGEMENT
MARKETING
ASSOCIATION

2018 Sponsorship Programs



Learn | Connect | Succeed

Annual Sponsorship Programs

Be on your audience's mind throughout the year with these sponsorship programs. Share your message and demonstrate your value directly to your target audience — the marketing communications professionals at asset management firms who get the work done each day.

Complete Sponsor Packages can be obtained on a Platinum, Gold or Silver level and ensure consistent engagement with the PAICR community throughout the year.

Platinum Level | \$10,000 (Limited to 4 only)

Year-Long Benefits:

- Company logo on PAICR website
- Two co-branded webinars per calendar year
- Branded inclusion in PAICR newsletters/blog
- Opportunity to sponsor a Regional Event
- Opportunity to include branded research/case study or educational piece on PAICR website/blog (up to 3)

Annual Conference and RFP Symposium

- Tabletop exhibit at both conferences
- Your Marketing Collateral/Giveaway included in attendee bag
- Company profile and banner ad in conference app or program
- App notifications to attendees reminding them to visit your booth
- Company logo on signage
- Verbal recognition at both conferences
- Pre- and post-conference attendee lists
- Three guest passes for each conference
- One-minute introduction at both conferences
- Opportunity to present a workshop at the annual conference
- Sponsor recognition in conference emails

Gold Level | \$5,500 (Limited to 8 only)

Year-Long Benefits:

- Company logo on PAICR website
- One co-branded webinar per calendar year
- Opportunity to include branded research/case study or educational piece on PAICR website/blog (up to 2)

Annual Conference or RFP Symposium

- Tabletop exhibit at one conference
- Your Marketing Collateral/Giveaway included in attendee bag
- Company profile in conference app or program
- App notifications to attendees reminding them to visit your booth
- Company name/logo on signage at selected PAICR conference
- Verbal recognition at one conference
- Three guest passes to one conference
- Pre- and post-conference attendee lists
- One-minute introduction at conference
- Sponsor recognition in conference emails

Silver Level | \$3,500 (Limited to 6 only)

Year-Long Benefits:

- Company logo on PAICR website
- Opportunity to include one branded research/case study or educational piece PAICR website/blog

RFP Symposium Only

- Tabletop exhibit
- Company profile in conference app or program
- App notifications to attendees reminding them to visit your booth
- Two guest passes
- Pre- and post-conference attendee lists
- Company name/logo on signage
- Sponsor recognition in conference emails

Vendor Conference Opportunities

Exhibiting is an excellent way to showcase your products and services and enhance your company's image with working professionals and decision-makers in the asset management marketing industry. Vendors can join us at either our spring RFP Symposium and/or our Fall Annual Conference and will have the following opportunities.

Exhibitor Booth

Includes:

- Tabletop Exhibit
- Company profile in conference app
- Two guest passes

RFP Symposium: \$2,500

The RFP Symposium focuses on PAICR members who work specifically in the RFP and Consultant Database areas of marketing. This one-day event is expected to attract more than 70 attendees representing more than 50 investment management firms.

Annual Conference: \$4,000

The Annual Conference is the largest gathering of PAICR members each year. This two-day event attracts over 100 attendees representing more than 60 investment management firms.

Networking Reception Sponsorship

An opportunity to meet with conference attendees in an informal cocktail reception. Vendors will be acknowledged in all conference materials and at reception and may bring promotional materials and set up in a prime area providing optimal interaction with attendees.

RFP Symposium (Post Conference): \$750

Annual Conference

Pre-Conference Reception for Early Arrivers: \$1,000

Annual Conference

End of Day One Reception: \$2,000

Conference App Sponsorship

As a Conference App Sponsor, your firm will be front and center on all promotion for App usage for the conference, will be listed on the splash page as attendees open the App, and will get a one-minute introduction opportunity at the opening of the conference.

RFP Symposium: \$1,000

Annual Conference: \$2,000

Break Sponsorship

An opportunity to meet with conference attendees between sessions, usually during a coffee break. Vendors may bring promotional materials and set up in a prime area providing optimal interaction with attendees.

RFP Symposium: \$500 (2 Available)

Annual Conference: \$800 (4 Available)

Conference Educational Session

An opportunity to present at a breakout session to conference attendees centered on educating our membership on industry trends, best practices, or tools to help them be more productive or impactful.

RFP Symposium: \$1,250

Annual Conference: \$2,000

Additional PAICR Opportunities

Webinar

Cost: \$1,500

(Per Webinar)

A PAICR webinar is an opportunity for vendors and service providers to increase their visibility to the PAICR community. These co-branded webinars give you direct access to the PAICR membership through a forum already familiar to, and popular with, members, and typically draw 20 to 30 participants.

PAICR webinars are scheduled at the discretion of the vendor and for a period of one hour; you control the timing of your webinar to fit your business and schedule. Align it with a new product launch, exciting company news or industry events.

Webinars are intended as educational opportunities for PAICR members. They focus on general professional or marketing concepts, problem-based scenarios with multiple solutions such as case studies, general industry developments or regulatory/legal changes, or general process improvements.

PAICR reserves the right to coordinate each webinar into its calendar of scheduled events to maximize the benefit to the PAICR membership and the vendor.

Regional Event

PAICR Regional Events are a great way to network with industry professionals in your geographic area, including both PAICR members and others in the community. These events are ideal for firms of every size and specialization, covering retail and institutional asset management marketing, internal and external communications, client service, RFP fulfillment, database management and more.

These events can be roundtables, meet-and-greet happy hours or any other networking opportunity — whatever works for you.

Sponsor Packages

	Platinum	Gold	Silver	RFP Exhibitor	Annual Conference Exhibitor
RFP Conference					
Present at Workshop	✓				
Tabletop Exhibit	✓	✓ RFP OR Annual	✓	✓	
Marketing Collateral/Giveaway in Attendee Bags	✓	✓			
Company Profile in App	✓	✓	✓	✓	
Banner Ad in App	✓				
Notification in App	✓	✓	✓		
Delegate Pass for Conference	3	3 RFP OR Annual	2	1	
Recognition on Signage and in Conference Communications	✓	✓	✓		
Pre Conference Attendee List	✓	✓	✓		
Post Conference Attendee List	✓	✓	✓	✓	
One minute intro at Conference	✓	✓ RFP OR Annual			
Annual Conference					
Present at Workshop	✓				
Tabletop Exhibit	✓	✓ RFP OR Annual			✓
Marketing Collateral/Giveaway in Attendee Bags	✓	✓			
Company Profile in App	✓	✓			✓
Banner Ad in App	✓				
Notification in App	✓	✓			
Delegate Pass for Conference	3	3 RFP OR Annual			2
Recognition on Signage and in Conference Communications	✓	✓	✓		
Pre Conference Attendee List	✓	✓			
Post Conference Attendee List	✓	✓			✓
One minute intro at Conference	✓	✓ RFP OR Annual			
Additional Benefits					
Co-Branded Webinars	2	1			
Post for PAICR Blog	3	2	1		

Sponsor/Exhibitor Guidelines

PAICR welcomes sponsors and exhibitors who offer the knowledge, tools and resources that provide solutions to our members. By partnering with PAICR, you will enjoy access to a highly engaged, diverse group of marketing and communications professionals. As thought leaders in your field, we encourage and will help you bring the latest in technology and ideas to our members.

In the spirit of partnership, the following are guidelines to ensure your visibility is maximized, while maintaining the privacy of our membership base.

CONFERENCES

- The Sponsor/Exhibitor will receive an attendee list one week before the conference.
- Pre- and post-conference attendee lists are to be used for a one-time engagement with members before and after the event. List will include names, emails, and physical addresses of attendees.
- No Sponsor/Exhibitor shall foster or conduct any event during the conference or exhibit hours that would reduce attendance at the PAICR event.
- Sponsor/Exhibitor-sponsored hospitality suites are not permitted.
- Active recruiting efforts are strictly prohibited at all PAICR events. Recruiting is defined as any communication or activity that encourages a change in firm or business model.
- Sponsors/Exhibitors will not distribute literature or any other materials other than from their allotted exhibit space or in conjunction with PAICR's on-site registration.
- The use of the PAICR logo is not allowed unless approved in advance by PAICR.
- Exhibit space is assigned based on date of payment, except that Platinum and Gold Sponsors will receive premium locations in the exhibit area.
- Exhibit space and set-up times will be confirmed at least one week before the conference.
- Exhibits may be cancelled up to 90 days prior to the event for a refund of 75% of the fees owed or paid.
- Any cancellation within 90 days of the event will be accepted but will result in forfeiture of all fees paid and Sponsor/Exhibitor will still be responsible for any fees owed.
- Sponsor/Exhibitor representatives over and above the number specified in the Sponsorship/Exhibitor agreement must pay the standard non-member conference fee.

WEBINARS

- Webinars must be centered on educating our membership on industry trends, best practices, or tools to help them be more productive or impactful. You may provide your firm's solution; however, the majority of content is to be educational in nature and not constitute an advertisement for the presenting firm.
- Webinars will be co-branded between PAICR and the presenting firm.
- A post-webinar list of attendees will be provided to the presenting firm. Presenting firms are allowed one follow-up email to attendees.
- The presenting firm is responsible for providing webinar materials in advance for PAICR approval, attending one practice session and the webinar itself, and answering attendee questions.

BLOG POSTS

- Material should be tailored for posting on the PAICR site – not a direct copy of a piece previously posted elsewhere
- Educational in tone -Not a sales piece
- Stay under 1000 words
- Due to the PAICR Communications Committee 2 weeks before publication

REGIONAL EVENTS

- Sponsoring firms may invite two firm members for every 15 participants.
- PAICR will promote the event to its membership base and prospective members via co-branded email and the PAICR website, and will manage registration of participants.
- The event sponsor can promote the event among its local clients/prospects who fit the PAICR member profile. The event sponsor may provide email addresses to PAICR for inclusion in event mailing lists.
- The event sponsor may distribute one piece of literature or one promotional giveaway item at the event.
- At the event, sponsoring firms may give a five- minute introduction on how their offering/firm can help PAICR members.
- A post-event list of attendees will be provided to the event sponsor. Event sponsors are allowed one follow-up email to attendees.

Commitment Form | 2018 Sponsorship Programs

Annual Sponsorship

- Platinum Level: \$10,000
- Gold Level: \$5,500
- Silver Level: \$3,500

Conference Exhibitor

- RFP Symposium: \$2,500
- Annual Conference: \$4,000

Conference Break

- RFP Symposium: \$500
- Annual Conference: \$800

Networking Receptions

- RFP Symposium (Post Conference): \$750
- Annual Conference Pre-Conference Reception for Early Arrivers: \$1,000
- Annual Conference End of Day One Reception: \$2,000

Educational Session

- RFP Symposium: \$1,250
- Annual Conference: \$2,000

Additional Opportunities

- Webinar: \$1,500
- Regional Event
- RFP Symposium Conference App: \$1,000
- Annual Conference App: \$2,000

Contact Information:

Name

Title

Phone Number

Mailing Address

City

State

Zip Code

Email

Payment Information:

\$

Total Payment

- Check Enclosed Mastercard VISA
 Discover AMEX

Card Number

Exp Date

CW

Name on Card



Signature

Send completed form to:

PAICR
4100 Carmel Road
Suite B-263
Charlotte, NC 28226

Questions:

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704-724-5753