



# The UHNW Institute

## Sponsorship Opportunities For Educational Partners

The **UHNW Institute** was founded in 2019 to transform the wealth management industry to better serve ultra-high net-worth families as they continue to evolve. Changes facing the industry and UHNW families include:

- Increasing complexity
- The need for a broader range of services
- Transfer of assets and control to women, millennials, and Gen Xers
- An inability to source advisors who meet their specific needs
- Longer lifespans, changing risks and rapid technological progress
- Talent needs exceeding the scope of many firms

To address these changes, The UHNW Institute has assembled more than 100 experienced practitioners and thought leaders, including those listed on the **Institute's website**.

## Educational Partners

### Commitment

- Our Educational Partners are individuals and firms who share a commitment to the Institute's Purpose and Mission and a desire to help the Institute accomplish them

### Unique Opportunity

- Enhance your firm's reputation by being seen as a strong supporter of The UHNW Institute
- Position your firm as a leader in the Wealth Management industry, serving Ultra-High Net Worth families.
- Build relationships with leading experts and senior operating executives of firms serving UHNW families and family offices.

## Our Mission

- Provide an **intellectual framework, understanding and organization** of family wealth management content
- **Educate advisors and family offices** on how best to support evolving UHNW families
- Provide **thought leadership, insights and resources** to advisors and family offices
- Promote **best practices, provide professional development and support sustainable, positive change** within our industry
- **Foster an equitable, collaborative and safe learning environment** within the wealth management industry

Reach out to [membership@uhnwinstitute.org](mailto:membership@uhnwinstitute.org) to become a sponsor today.

# Sponsorship Levels

<b>PREMIER</b>	<b>Annual Sponsor of The UHNW Institute</b>	<b>\$30,000</b>
<b>PLATINUM</b>	<b>Annual Sponsor of The UHNW Symposium OR Sponsor of The UHNW Collegiums (2)</b>	<b>\$20,000</b>
<b>GOLD</b>	<b>Sponsor of Individual Institute Research Projects OR Annual Sponsor of an Individual Institute Program</b> <ul style="list-style-type: none"><li>• Roundtables</li><li>• Masterclasses</li><li>• Practice Management Clinics</li></ul>	<b>\$15,000</b>
<b>SILVER</b>	<b>Sponsor of Single Institute Event</b> <ul style="list-style-type: none"><li>• Roundtable</li><li>• Masterclass</li><li>• Practice Management Clinic</li><li>• Study Group</li><li>• Podcast</li></ul>	<b>\$7,500</b>
<b>BRONZE</b>	<b>Sponsor of Hospitality at a Single Institute Program or Event</b> <ul style="list-style-type: none"><li>• Luncheon</li><li>• Cocktail Reception</li><li>• Dinner</li></ul>	<b>\$5,000</b>

## Important Notes For all Sponsors

Sponsor benefits apply as stipulated, provided all information and a signed commitment for payment are received by The Institute no later than 30-days prior to the meeting start date. The sponsor is responsible for providing all company materials (logos, links, PDFs, contact information, etc.) to The Institute by specified deadlines. Proper sponsor recognition cannot be provided until company materials are received.

## Sponsor Terms and Conditions

### Confirmation and Payment

- Sponsorships are confirmed with a fully executed Sponsorship Agreement.
- Payment must be received 30-days prior to the event to be eligible for sponsor benefits at the meetings.

### Policy and Acknowledgment

- Code of Conduct: The UHNW Institute is committed to providing a welcoming and inclusive environment for all persons. Sponsors and all attendees are required to acknowledge The UHNW Institute Code of Conduct to register for events.
- Outreach to Members: Phone calls & emails, pre- or post-meeting, will not be welcomed by members. Sponsor communications to members are limited to responding to a member's outreach or inquiry.

### Professional Programming

- Programs, Events and associated Hospitality: Sponsors may not distribute materials or conduct promotional activities including demonstrations during Institute Programs, Events and associated Hospitality unless specifically permitted by The Institute.
- Speaking Opportunities: Sponsorship does not guarantee speaking opportunities.



# Educational Partner Sponsorship Benefits

## General Benefits

*The following benefits are offered at all levels:*

- **Visibility for Educational Partners** inside The Institute through its member portal and member communications (e.g., Newsletter), and visibility outside the Institute through its website and other marketing activities (e.g., social media).
- **Invitations for Educational Partner representatives** to attend select Institute events.
- **Invitations for Educational Partner Clients to attend select events** at no fee with access to the Resource Library. Clients must qualify for Institute membership.
- **Opportunities to recommend Resource Library content** if in alignment with Institute Editorial Guidelines and criteria, which will be selected based solely on the merits of the content.
- **Opportunities to participate in Institute Programs and Events** as a panelist and/or speaker if there is alignment with expertise for the topic. Sponsorship does not guarantee participation and final decision will rest with the Institute Editorial Board.
- **Participation on an Educational Partner Advisory Committee** that:
  - Provides input regarding the Educational Partner Program; and,
  - Develops the agenda for an annual Educational Partner's in-person event that includes representatives of the Educational Partners and members of The Institute's leadership.
- **Opportunity to renew program involvement** if Educational Partner criteria continues to be met.

## Program Specific Benefits

- Acknowledgement of the Educational Partner in the materials provided to Program attendees, that includes each sponsor's name, logo and link to its website.
- Acknowledgement and introduction of the Educational Partner's attendee at the beginning and end of the Program(s) sponsored.
- Invitation for the Educational Partner's Program attendee to facilitate a group during a breakout session and then report on results during the subsequent reporting session, if appropriate.
- Acknowledgement in any output from a Program that is distributed or posted (website, LinkedIn, etc.)
- Additional invitation(s) to attend the sponsored Program and associated hospitality events.
- Permission for the sponsor to distribute or post an Institute-approved description of its involvement with the sponsored program(s).
- Recording of an interview with the Educational Partner's Program attendee at the conclusion of the program – after editing by the Institute – the sponsor can distribute or post.
- A post-Program Zoom meeting with members of the Educational Partner's staff during which the Educational Partner's attendee and one or two Institute representatives discuss results of the Program.
- Priority consideration to be a sponsor of The Institute's Annual Symposium

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