



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 to become a sponsor today.

Sponsorship Levels

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

Benefits-at-a-Glance, Educational Partner

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.



Important Notes for 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.

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