

# Educational Partner Opportunities

Advancing Ideas, Insight, and Innovation Together



Founded in 2019, The UHNW Institute is redefining wealth management for ultra-high-net-worth families worldwide. As a nonprofit think tank and learning exchange, it provides advisors and firms with original ideas, actionable insights, and collaborative opportunities to help families build prosperous, lasting relationships across generations.

The UHNW Institute's Educational Partners are members that include businesses and experts who share our mission to elevate the wealth management industry. With a commitment to excellence, innovation, and the long-term success of UHNW families, these partners gain unique opportunities to showcase expertise, build influence, and engage with the Institute's global community.

## Why Become an Educational Partner?

### Shared Purpose & Industry Leadership

Join a select circle of partners aligned with the Institute's mission to raise the standard of wealth management and support the enduring success of UHNW families.

### Credibility & Visibility

Strengthen your brand by being recognized as a trusted partner, featured in member communications, our website, and across social media.

### Exclusive Access & Participation\*

Receive invitations to select events, contribute thought leadership through the Resource Library, and be considered for panels and programs.

### Meaningful Connections

Engage directly with advisors, family office executives, and global experts in UHNW wealth management.

### Strategic Influence

Hold a seat at the table through the Educational Partner Advisory Committee, guiding the program's evolution and participating in an annual, invitation-only partner summit.



# Educational Partner Sponsorship Opportunities

CATEGORY	MAIN BENEFIT	PRICE
Premier	Annual Sponsor of The UHNW Institute	\$30,000
Platinum	Annual Sponsor of the UHNW Symposium, the two UHNW collegiums, or Women's Summit	\$20,000
Gold	Sponsor of Individual Research Projector Annual Sponsor of an Institute program series: <b>Roundtables • Masterclasses • Practice Management Clinics</b>	\$15,000
Silver	Single Event Sponsor <b>Podcast • Masterclass • Roundtable • Study Group Practice Management Clinic</b>	\$7,500
Bronze	Hospitality Sponsor at an Institute Program or Event	\$5,000

The grid above highlights our Marketplace Partner sponsorship levels and corresponding investments. For a full breakdown of requirements, benefits, visibility, and recognition offered at each level, please reach out to [membership@uhnwinstitute.org](mailto:membership@uhnwinstitute.org).

*\*Sponsorship does not guarantee participation. Final decision will rest with the Institute.*

*\*\*Must meet the Sponsor Criteria for UHNW vendors (curation, exclusivity, reputation, alignment with mission). Products/services must be premium, relevant to UHNW needs, and uphold the highest standards of client confidentiality and service. Participation approved by the Institute's selection committee.*

## Important Information for Educational Partner (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.

Contact [membership@uhnwinstitute.org](mailto:membership@uhnwinstitute.org) to become sponsor today!

