

Marketplace Partner Opportunities

Showcasing Innovation,
Integrity, and
Exceptional Quality



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 Marketplace Partner program offers a curated sponsorship opportunity for companies whose products and services reflect the lifestyle and values of the ultra-high-net-worth community and their clients. This exclusive program highlights companies that offer quality, discretion, and innovation, showcasing their unique offerings through our exclusive Marketplace Partner experience.

Why Become a Marketplace Partner?

Prestige & Alignment

Be recognized among a curated group of companies whose offerings reflect the quality, discretion, and innovation valued by UHNW advisors and families.

Visibility & Recognition

Enhance your brand presence through the Institute's communications, website, and exclusive Service Provider Directory, reinforcing your status as a trusted, best-in-class provider.

Curated Access

Gain visibility among advisors and family office leaders who influence decisions and help shape the experiences of UHNW families.

Trusted Relationships

Build enduring connections within an exclusive community that values excellence, integrity, and long-term partnership.

Industry Partner Categories

The UHNW welcomes partners who represent a diverse range of industries—from bespoke lifestyle goods and luxury services to specialized wealth management solutions—providing our audience with trusted options. Examples include:

- **Travel:** luxury tour operators; private aviation; yacht charters
- **Health & Wellness:** concierge medicine; spa retreats; performance coaches
- **Education:** family governance trainers; intergenerational education programs
- **Lifestyle:** art advisors; chefs & restaurants; stylists & fashion; personal security; jewelry; beverages; collectables
- **Home & Estate:** architects; interior designers; property managers
- **Legal & Financial:** boutique law firms; tax advisors; insurance specialists
- **Technology:** Consulting services; devices; platforms; applications & tools



Marketplace Partner Sponsorship Levels*

CATEGORY	MAIN BENEFIT	PRICE
Exclusive Marketplace Sponsor	Main Marketplace Sponsor of an Entire Event	\$25,000
Signature Sponsor	In-Person activation at the Annual Symposium or Other Signature Event	\$10,000
Elite Sponsor	Sponsorship of Major Institute Event	\$5,000
Select Sponsor	Listing in the Marketplace Provider Library and Associate Event Sponsor	\$2,500

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.

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

Important Information for Industry 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 to become sponsor today!

