



INVESTMENTS & WEALTH EXPERIENCE

Fort Lauderdale, FL: April 20-21, 2026 | Scottsdale, AZ: November 16-17, 2026

Two Destinations. Two Unforgettable Experiences.

Experience 2026 will feature two flagship in-person events uniting the industry's most engaged financial advisors and thought leaders. Advisors attend to explore fresh strategies, sharpen their practices, and better serve their clients—making it the premier stage for sponsors to showcase expertise and strengthen brand visibility.

The Institute is enhancing sponsor presence in 2026 with more personalized networking touchpoints and elevated ways to connect with attendees. Whether involved in one or both events, sponsors can align with the Institute's elite member base and build meaningful influence across the profession.

Expected Advisor Attendees by Channel

RIA: 35%

WIREHOUSE: 34%

IBD: 11%

BANK/TRUST: 11%

OTHER: 8%



**EXPECTED ATTENDANCE
500+**



**EXPECTED ADVISOR AVERAGE AUM
\$601 Million**

Sponsors

- General Session: \$50,000
- Solo Breakout Session: \$40,000
- Pre-Conference Session: \$40,000
- Ed Talk Session: \$25,000
- Women & Wealth Session: \$25,000

Exhibit space is included with these sponsor opportunities

Exhibitors

- Exhibitor: \$10,000

Social

- Braindate: \$15,000
- Next-Gen Event: \$15,000
- Elite Lounge: \$15,000
- Welcome Reception: \$7,500

Food + Beverage

- Elevated Coffee Station: \$15,000
- Breakfast: \$10,000
- Lunch: \$10,000
- Break Station: \$10,000
- Water Station: \$10,000

Giveaways + Services

These elevated opportunities are only available for Sponsors and Exhibitors

- Lanyards: \$10,000
- Key Card/Packet: \$10,000
- Wifi Splash Page: \$7,500
- Headshot Station: \$7,500

Connect with the Institute's Sales Team to learn more about preferred pricing when sponsoring at both Experience events.

April Ferrell, CIMA®
Managing Director,
Global Business Development
aferrell@i-w.org
(303) 850-3093

Lara Davies
Director, Client
Relationship Management
ldavies@i-w.org
303-850-3081

**LEARN MORE ABOUT OUR
EXPERIENCE EVENTS!**

