The Investments & Wealth Institute Strategy Forum 2024 is the premier event for elite advisors who want to learn about the latest tools, techniques, and strategies being used in the investment, wealth and retirement management industry.

**Sponsor Rights & Benefits**

### Fall Strategy Forum
- Benefits for Sponsor - $25,000
- Exhibit Table
- One Bonus Opportunity (first-come, first-served as available after Platinum and Gold partners select)
- 3 registrations (not including speakers)
- Signage throughout venue with logo
- Logo recognition on conference loops
- Logo recognition in the conference app
- Opportunity to submit for break-out session presentation rights (Session and speaker must be IWI approved and will be recorded for possible inclusion in the on-demand conference platform.)
- Color logo on conference pages of website with link
- Pre-and post-conference attendee list (no emails – opportunity to contact attendees twice before and twice after the event)

### Benefits for Exhibitor - $18,000
- Exhibit Table
- 2 registrations
- Listing in the conference app
- Listing on conference pages of website
- Pre-and post-conference attendee list (no emails - opportunity to contact attendees once before and once after the event)

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The Investments & Wealth Institute is a non-profit professional association, advanced education provider, and certification board for financial advisors, investment consultants, financial planners, and wealth managers who continuously strive for excellence and ethics.

Our mission is to deliver premier investment consulting and wealth management credentials: Certified Investment Management Analyst® (CIMA®), Certified Private Wealth Advisor® (CPWA®), Retirement Management Advisor® (RMA®), and world-class education.

**CONFERENCES**
- Investments & Wealth Experience 2024
- 2024 Fall Forum

**3 CERTIFICATIONS**
- Certified Investment Management Analyst®
- Certified Private Wealth Advisor®
- Retirement Management Advisor®

**7 CERTIFICATE COURSES**
- Applied Behavioral Finance
- College & Student Loan Planning Essentials
- Endowments & Foundation Consulting
- Exceptional Advisor: Communicate Your Value and Build Client Engagement
- Investment Management Essentials
- Private Markets for Advisors
- Private Wealth Essentials

**3 MICRO-COURSES**
- Explaining Blockchain and Digital Assets to Clients and Prospects
- Social Security Planning
- Taxation of Cryptocurrency and Digital Assets: Part 1 and Part 2

**2 SHORT COURSES**
- Exceptional Advisor: Communicate Your Value & Build Client Engagement Using Befi to Build Trust and Manage Investor Behavior

**3 AWARD-WINNING PUBLICATIONS**
- Investments & Wealth Monitor
- Journal of Investment Consulting
- Retirement Management Journal

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**COLLECTIVELY MANAGE**
- $3.5 TRILLION
- Average AUM $364 Million

**18,000+ MEMBERS GLOBALLY**
- CIMA® Certificants: 8,727
- CPWA® Certificants: 3,284+
- RMA® Certificants: 356

**ADVISORS REPRESENT ALL ADVISORY CHANNELS**
- Wirehouse: 35%
- RIA: 26%
- National & Regional: 14%
- Hybrid RIA: 13%
- IB: 10%
- Retail Bank: 1%
- Insurance BD: 1%

**GENERATIONAL DISTRIBUTION**
- (>71) Silent Generation: 2.9%
- (52-70) Baby Boomers: 52.1%
- (36-51) Gen X: 35.5%
- (<36) Millennial: 9.5%