WHO IS THE INVESTMENTS & WEALTH INSTITUTE?

The Investments & Wealth Institute is the premier professional association for advanced financial advisors and wealth managers. Since 1985, we've delivered rigorous education, elite certifications, and upheld the highest ethical standards. Our brand reflects excellence, exclusivity, and unmatched quality—trusted by top professionals across wirehouses, RIAs, broker-dealers, private banks, and family offices. Through world-class partnerships and learning experiences, we empower advisors to lead with confidence in a rapidly evolving industry.

PARTNER WITH THE INSTITUTE

Align your brand with the most sophisticated segment of financial services. Our members actively seek innovative solutions and trusted partners to grow their business and elevate client service. Through high-impact channels—like our Spring and Fall Experience conferences, webinars, newsletter and publication advertising, and research distribution—you'll gain targeted visibility and credibility. Branding with the Institute signals your commitment to quality, performance, and lasting impact.

9,000+
CIMA® Certificants

4,000+
CPWA® Certificants

360+
RMA® Certificants

Average AUM
$601 Million

AGE DISTRIBUTION

Silent Generation: 1%
Baby Boomers: 19.2%
Generation X: 40.8%
Millenials: 27.9%
Generation Z: 9.1%

ADVISORS REPRESENT ALL ADVISORY CHANNELS

Wirehouse/Regional Brokerage: 35%
Independent RIA: 24%
Independent Firm (IBD)/Multiple Reg: 16%
Asset Manager/Industry Provider: 12%
Other: 7%
Bank/Trust: 6%

EVENTS

EXPERIENCE 2026

Expected Attendance per Event: 500+
Spring: April 20–21
Fort Lauderdale Marriott Harbor Beach Resort & Spa
Fall: November 16–17 | Grand Hyatt Scottsdale Resort

The Institute's premier in-person events, Experience 2026 brings together top financial advisors, wealth managers, and industry leaders. These high-impact, two-day conferences offer prime opportunities for brand exposure, thought leadership, and direct engagement with a sophisticated, solutions-driven audience. Sponsorships include premium branding, speaking roles, and high-touch networking with decision-makers seeking innovative partners.

WEBINARS

Expected Attendance: 200-400

Showcase your expertise to the industry's most advanced advisors by sharing your thought leadership and reinforcing your brand through a webinar that delivers timely, relevant, and impactful content. With the Institute managing the details—from marketing and promotion to CE accreditation—you gain a turnkey platform to elevate your voice through this high-impact sponsorship.

ADVERTISING

Gain direct access to the Institute's full membership of top-tier advisors through our flagship, peer-reviewed journal—published six times a year. With a high-impact ad-to-editorial ratio and trusted content on portfolio strategy, retirement, and wealth planning, your brand is showcased in a respected, insight-driven environment professionals rely on.

RESEARCH

Reach the Institute's elite members through two research pathways: (1) distribute your firm's already completed research directly to our member base, or (2) conduct custom research in partnership with one of the Institute's trusted research firms, leveraging a survey sample of Institute members. Both include a full-page ad, publication in *Investments & Wealth Review*, multi-channel promotion, and the chance to present findings via webinars or conferences—maximizing visibility and credibility.

INVESTMENTS & WEALTH INSTITUTE®

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.

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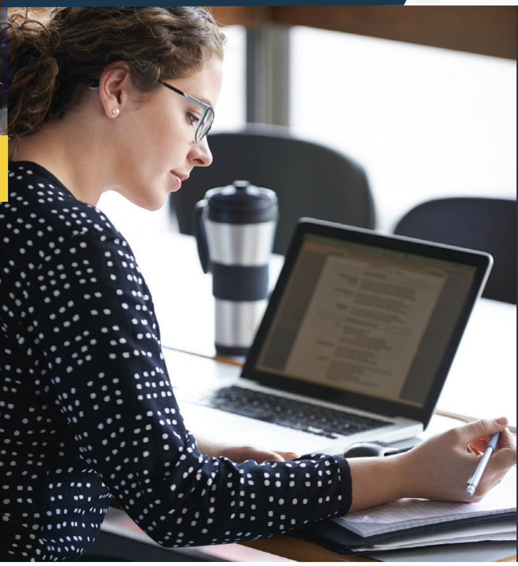
LEARN MORE ABOUT OUR EXPERIENCE EVENTS!

INVESTMENTS & WEALTH INSTITUTE®

WEBINARS



Showcase your expertise to the industry's most advanced advisors by delivering content that is timely, relevant, and impactful. With the Institute managing the details—from marketing and promotion to CE accreditation—you gain a turnkey platform to elevate your voice. Establish your firm as a trusted thought leader, strengthen your brand with a highly engaged advisor audience.

Institute Recommended Topics:

- Tax Planning
- Portfolio Construction with ETFs
- Portfolio Hedging
- Global Macroeconomic Outlook
- Delivering Wealth Management to Families
- Behavioral Finance
- Fintech Innovation
- AI in Wealth Managment
- Discovery Conversations with Clients
- Role of Structured Products in a Portfolio
- Private Equity Landscape
- Liquid Alternatives

And more!

Use your subject matter experts, or let us help provide one.

- Each Webinar is 60 minutes (50-min. presentation with 10 min. Q & A). One hour of CE credit available to participants for no cost. Registration is free
- Institute will handle all CE approval and reporting
- Approximately 200-400 advanced practitioners register for each webinar
- Institute handles all promotion, marketing, and registration activities
- Institute will provide you creative assets for you to send to your clients and prospects
- Webinars may be archived on our learning management system for 12 months
- Full-page color printed advertisement in the *Investments & Wealth Review*
- Monthly Sponsor of Institute newsletters with logo and digital banner advertisement

Sponsored Webinar - $15,000

LEARN MORE:

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INVESTMENTS & WEALTH INSTITUTE

PUBLICATIONS & ADVERTISING

INVESTMENTS & WEALTH REVIEW

Published bimonthly (six issues per year) *Investments & Wealth Review* ranks among the most valued benefits for Institute members. Each issue reaches our entire member base of elite investment and wealth management professionals. *Investments & Wealth Review* offers you one of the best ad-to-editorial ratios in the industry, as well as an uncompromised, 100% peer-reviewed editorial environment.

GENERAL REQUIREMENTS:

Only full-page ads accepted

Binding Method: Perfect

Printing Process: CMYK

BLEED AD SIZES:

Trim size: 8.375 x 10.875"

Bleed size: 8.625 x 11.125"

Live area: 7.875 x 10.375" (outside back cover)

7.375 x 10.375" (inside pages)

Issue Date	Topic
January/February	Practice Makes Perfect? Advisors Up Their Operational Game
March/April	Advisory Adjacencies for Serving the Ultra-Wealthy
May/June	Portfolio Construction in a Fracturing World
July/August	The Retirement-Oriented Advisor
September/ October	Succeed at Succession: Advice for the Generations
November/December	Digital Threats and Opportunities: Future Proofing the Advisory Practice

PRODUCTION PERSONNEL

Debbie Nochlin

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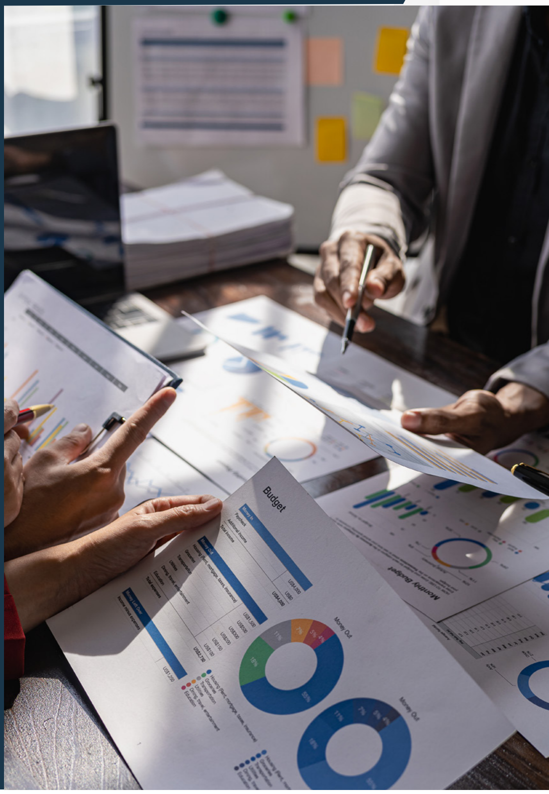
dnochlin@i-w.org

Email Submission Preferred

PRINT EDITION: FULL-PAGE, FOUR COLOR RATES (NET)	PRICE (FOR THREE ISSUES)
Run of Book	$5,000
Inside Front/Back Cover Opposite Table of Contents	$10,000
Back Cover	$15,000

LEARN MORE:

RESEARCH SPONSORSHIP



RESEARCH DISTRIBUTION: $15,000

Distributing your research provides a powerful way to expand your reach and showcase thought leadership with Institute members. Completed research must be approved by Investments & Wealth Institute.

- The Institute will print sponsor's research in the *Investments & Wealth Review* member magazine distributed to Institute members. The printed research will include a four-color/full-page advertisement included in that issue of the *Investments & Wealth Review*
- Research will be promoted on the Institute website, social media outlets, and newsletters
- Sponsorship package for webinars and conferences to present findings to Institute members (additional cost applies)

CUSTOM RESEARCH SURVEY AND DISTRIBUTION SPONSORSHIP

Collaborate with the Institute and a third-party research partner to produce a comprehensive study and white paper on an agreed upon topic.

- Working with the research firm, the Institute will distribute an advisor survey to their financial advisor members, targeting a mutually agreed upon sample size
- The Institute will print the white paper prepared by the research firm in the *Investments & Wealth Review* member magazine distributed to Institute members
- Four-color/full page advertisement in the issue of the *Investments & Wealth Review* issue
- The Institute will partner with the research firm and the sponsor to develop an appropriate media strategy including a press release, messaging, a targeted media list, and executing outreach
- Research will be promoted on the Institute website, social media outlets, and newsletters
- Distribution package for webinar and conference sponsorships to present findings to Institute members (additional cost applies)