

# FINANCIAL ADVISOR FORUMS

## SUSTAINABLE & IMPACT INVESTING SPONSORSHIP OPPORTUNITIES

Investors are clearly interested in ‘responsible’ investing, but most advisors don’t feel knowledgeable or confident enough to start the conversation.

Advisor education is key to unlocking the opportunity.

**POSITION YOUR FIRM AS AN INDUSTRY LEADER  
AND JOIN US AS SPONSOR.**



Align your firm with this high-profile initiative to educate Financial Advisors about sustainable investing and impact investing. Build brand awareness and relationships with forward-thinking, growth-minded FAs focused on meeting client needs and positioning their businesses for future growth.

### MMI/MORNINGSTAR SUSTAINABLE INVESTING FINANCIAL ADVISOR FORUM

November 4 | Chicago

A one-day workshop – presented by MMI and Morningstar – for Financial Advisors committed to “staying ahead of the curve” and moving from theory to practice in implementing sustainable investing for their clients.

### MMI/SORENSEN IMPACT INVESTING ADVISOR FORUM

November 14 | NYC

A one-day workshop with Jim Sorenson, a global impact investing leader, and other professionals from the Sorenson Impact Center. Far from ivory-tower academics, the professionals at the Sorenson Impact Center are steeped in the real-world of impact investment.

### MMI/TIIP/TONIC ESG SUMMIT

EFFECTIVELY WORKING WITH ENDOWMENT  
& FOUNDATION CLIENTS

January 9 | Boston

Aligning mission with investment policy. A half-day workshop – co-hosted by MMI, The Investment Integration Project (TIIP), and TONIC – that will outline concrete investment opportunities, ways to help facilitate the discussion with key stakeholders, and how to incorporate mission and vision into your foundation clients’ investment policy.

SUSTAINABLE INVESTING INITIATIVE



SORENSEN  
IMPACT



TIIP THE INVESTMENT  
INTEGRATION PROJECT



### SINGLE EVENT SPONSORSHIP

#### FORUM SPONSOR — \$5,000

- Ten complimentary Forum registrations for Financial Advisors (or others)
- One complimentary Forum registration for firm representative
- Sponsor recognition and logo on event website and email communications
- Sponsor recognition and logo on general session slide
- One company-supplied handout distributed to all attendees
- Electronic list of attendees pre- and post-event

#### SCHOLARSHIP SPONSOR — \$2,500

- Five complimentary Forum registrations for Financial Advisors
- One complimentary Forum registration for firm representative
- Sponsor recognition and logo on general session slide
- Electronic list of attendees pre- and post-event

### MULTIPLE EVENT SPONSORSHIP

#### TITLE SPONSOR OF THREE EVENTS — \$12,000

**Forum Sponsor** of all three events at a 20% discount

#### TITLE SPONSOR OF TWO EVENTS — \$8,500

**Forum Sponsor** of any two events at a 15% discount

To secure your sponsorship or for more information, please contact Sam Lustig at 646-868-8516 or [slustig@mminst.org](mailto:slustig@mminst.org).



## HOSTS

**About the Money Management Institute (MMI):** Established in 1997, the Money Management Institute (MMI) is the industry association representing financial services firms that provide financial advice and professionally-managed investment advisory solutions to investors. Through conferences, educational resources, and thought leadership, MMI facilitates peer-to-peer connections, fosters industry knowledge and best practices, and supports the evolution and professionalism of the investment advisory industry. MMI member firms are dedicated to helping investors plan for and fulfill their financial and life goals. For more information, visit [www.MMIInst.org](http://www.MMIInst.org).

**About Morningstar, Inc.:** Morningstar, Inc. is a leading provider of independent investment research in North America, Europe, Australia, and Asia. The company offers an extensive line of products and services for individual investors, financial advisors, asset managers, retirement plan providers and sponsors, and institutional investors in the private capital markets. Morningstar provides data and research insights on a wide range of investment offerings, including managed investment products, publicly listed companies, private capital markets, and real-time global market data. Morningstar also offers investment management services through its investment advisory subsidiaries, with more than \$200 billion in assets under advisement and management as of March 31, 2017. The company has operations in 27 countries.

**About the Sorenson Impact Center:** The Sorenson Impact Center, housed at the David Eccles School of Business at the University of Utah, is a think-and-do tank that marshals capital for social good, empowers data-driven programs, breaks down silos across sectors and equips the next generation of leaders with social purpose. To learn more, visit <http://www.sorensonimpact.com>.

**About The Investment Integration Project (TIIP):** TIIP's mission is to help investors understand how healthy environmental, social, and financial systems can benefit their portfolios. TIIP provides thought leadership, research, and consulting services that support investors' pursuit of system-level investing, an advanced sustainable investing approach that focuses on managing systemic risks and investing in solutions to systemic problems. For more information, visit <https://www.tiiproject.com>.

**About Toniic:** Toniic is the global action community for impact investors. With members in over 26 countries, Toniic is a nonprofit supporting a global network of high net worth individual, family office, and foundation asset owners by curating an interactive community, educational resources, and investment opportunities in all asset classes. Toniic also serves the impact investing field at large with the T100 Project, which provides inspiration and evidence from investors committed to total portfolio activation, and with Impact Terms, which provides a curated library of innovations in impact investing terms and structures for all market participants.

## SUSTAINABLE & IMPACT INVESTING SPONSORSHIP OPPORTUNITIES

### COMMITMENT FORM

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#### SPONSOR INFORMATION

Contact Name		Firm Name			
Firm Address		City	State	Zip	
Phone	Fax	Email			

#### SPONSOR TYPE

Title Sponsor - Three Events	<input type="checkbox"/> \$12,000		
Title Sponsor - Two Events	<input type="checkbox"/> \$8,500	Event #1:	Event #2:
Forum Sponsor	<input type="checkbox"/> \$5,000	Event:	
Scholarship Sponsor	<input type="checkbox"/> \$2,500	Event:	

#### CANCELLATION POLICY

Sponsorship packages are considered final and binding at the time this Commitment Form is approved by MMI. In extreme circumstances, cancellation requests received prior to September 30, 2019 will be considered for a 50% refund of the fees paid. As of September 30, 2019, all Sponsorship packages are non-refundable.

#### PAYMENT INFORMATION

Applications will not be processed without payment. Please select your method of payment below.

Check enclosed       Check to be mailed  
 VISA       MasterCard       American Express

Credit Card Number	CW	Expiration Date	
Name on Card (if different from above)			
Address on Card (if different from above)	City	State	Zip

Signature

If paying via check, please make it payable to Money Management Institute and send to: Money Management Institute, 1177 Avenue of the Americas, 7th Floor, New York, NY 10036.

Please email this completed Commitment Form to Samantha Lustig at [slustig@mminst.org](mailto:slustig@mminst.org).