

GET

THERE



RIA Conference 2018

**SYNERGY**

May 16-18 | San Diego, CA

## WELCOME TO SYNERGY2018!

In 2017, the Synergy conference saw a record-number of advisor attendees and 2018 is shaping up to attract an even larger number of advisors, sponsors and industry influencers. TradePMR's annual conference draws growth-driven RIAs. That's why you should be there!

TradePMR will be celebrating its 20th Anniversary at Synergy2018. The conference theme "Get There" will focus on what it takes to achieve success. We are kicking off the conference with a branding welcome reception where advisors can connect with industry experts that can help strengthen their business. During this time, you will be granted an opportunity to connect with our advisors face to face.

Technology integrations and ramping up online presence will also be hot topics at the conference. Our goal is to provide sponsors more access to advisors through general session speaking opportunities, networking lunches, longer receptions in the sponsor area, and the freedom to meet with potential clients in the evenings. The first sponsors to sign up will also be given the opportunity to do a Soap Box Talk in the reception hall.

The dinner cruise is an additional sponsorship opportunity. Attendance on the ship will be limited to dinner cruise sponsors – giving your representatives a captive audience for three uninterrupted hours as you get to know TradePMR's advisors. Sponsorship for the cruise is first-come-first-serve. If you have any questions please contact me at [EWeintraub@TradePMR.com](mailto:EWeintraub@TradePMR.com).

We look forward to your support in 2018.

See you in San Diego!

Ellen Weintraub  
Business Coordinator

# SYNERGY DATES AND TIMES FOR SPONSORS

## WEDNESDAY, MAY 16TH

Noon	Registration & Sponsor Set up
3 - 6 p.m.	Registration & Branding Reception
6 - 9 p.m.	Dinner Cruise boarding from the Marriott Marquis dock.

**| NEW IN 2018 |** Attendees will be encouraged to attend an all new Branding Reception during registration. As advisors arrive, they will be guided through the exhibit hall for product demos, professional headshots, LinkedIn profile analysis, website analysis, and more to boost their brand. The 3-hours will allow sponsors ample opportunity to give in-depth, one-on-one demos or a scheduled Soap Box Talk in the exhibit hall.

## THURSDAY, MAY 17TH

7:30 a.m.	Breakfast in the exhibit hall
8:30	CEO Welcome
9:00	Sponsored TRADE talk
9:05	General Session
9:30	Sponsored TRADE talk
9:35	General Session
10:00	Sponsored TRADE talk
10:05	Break in Exhibit Hall
10:35	Sponsored TRADE talk
10:40	General Session
11:00	Keynote Speaker – Noon Networking Lunch
1:30	Breakout Session 1 – Platinum
2:15	Break
2:30	Breakout Session 2 – Gold
3:15	Break
3:30	Sponsored TRADE talk

3:00	Keynote Speaker
5:00 – 6:00	Networking Cocktail Reception in Exhibit Hall

## FRIDAY, MAY 18TH

7:30 a.m.	Continental Breakfast Exhibit Hall Breakdown
8:30 a.m.	TradePMR Breakout Sessions
11:00 a.m.	Keynote Speaker
Noon	Closing Remarks

**| ATTENTION |** All times are local and subject to change pending final agenda.

# SPONSORSHIP OPPORTUNITIES

For our 20th Anniversary, we are assembling our biggest conference to date! Our sponsors are an important part of our celebration. We want to ensure that you have the opportunity to connect with TradePMR advisors through a fully customizable experience. The Marquee sponsors get 30 minutes on the general session stage. Platinum and Gold sponsors have the opportunity to host their own breakout session. You'll work with the conference planning committee on a topic, and benefit from advance promotion designed to attract the maximum number of attendees to your session. Platinum sponsors will also be awarded additional time on the main stage to deliver a 5-minute sponsor message, called a TRADETalk, to all conference attendees.

# PRELIMINARY EXHIBIT SCHEDULE

16<sup>TH</sup>

WEDNESDAY

Noon -3 p.m.  
Sponsor Set up

3 - 6 p.m.  
Registration & Branding  
Reception

17<sup>TH</sup>

THURSDAY

7:30 – 8:30 a.m.  
Continental Breakfast  
Exhibit Hall Open

10 a.m. – 10:30  
Break in Exhibit Hall

Noon – 1:30 p.m.  
Networking Lunch

5 – 6 p.m.  
Sponsor Networking Cocktail  
Reception in Exhibit Hall

18<sup>TH</sup>

FRIDAY

7:30 a.m.  
Continental Breakfast

8:30 a.m.  
Exhibit Hall Breakdown

## SPONSORSHIP BENEFITS

	Marquee	Platinum	Gold	Silver
Price	\$30,000	\$15,000	\$8,000	\$4,000
Booth Size				
One booth space with 8ft. high backdrop, 3 ft. rail dividers. Booth priority selection is by sponsorship level and order of registration.	16 x 8	8 x 8	8 x 8	8 x 8
Registration and Special Access				
Includes access to general, breakout and keynote sessions. Additional passes may be purchased.	5	3	2	2
Participation				
General Session Speaking Opportunity	X			
TRADE Talk Live from the mainstage, sponsors are invited to give a five-minute presentation.		X		

Breakout Session Sponsors will work with the conference planning committee on a topic, and benefit from advance promotion designed to attract the maximum number of attendees to your session.		X	X	
Demo @ Branding Registration Reception – Sponsors are invited to give a 10-minute demo of their product to Branding Reception attendees. Limited to first 6 sponsors.	X	X	X	X

### Recognition

Sponsor recognition on conference lanyard	X			
Daily thank you announcements in Exhibit Hall	X			
Recognition on sponsor section of website	X	X	X	X
Recognition on all conference press releases	X	X		
Recognition on conference signage	X	X	X	X
Recognition on slides during general sessions	X	X	X	X

### Marketing

Social Media mentions during conference	4x	3x	2x	1x
TradePMR full advisor contact list four weeks prior to the conference	X	X		
Full page advertisement in conference program	X	X		
Half page advertisement in conference program			X	
List of conference attendees post conference	X	X	X	X

## ADDITIONAL ADVERTISING, PROMOTIONAL AND SPONSORSHIP OPPORTUNITIES

### ADD TO PLATINUM SPONSOR PACKAGE

**| NEW IN 2018 | ANNIVERSARY DINNER CRUISE (3 AVAILABLE) - \$5,000**

2 of your representatives may join us as we set sail for a three-hour dinner cruise. Sponsor attendee is limited to those sponsoring the event. Join TradePMR leadership and advisors in this exclusive opportunity to engage with the conference attendees on board. Platinum Sponsors only

### ADD TO ANY SPONSOR PACKAGE

**HEADSHOT BOOTH - \$3,000**

Encourage attendees to update their profile picture! This sponsorship includes a booth next to the professional photographer booth with custom signage during the Branding Welcome Reception. Say cheese!

### **CRAFT BEER TASTING @ SPONSOR NETWORKING RECEPTION - \$6,000**

Our attendees are thirsty at the end of a long day. This sponsorship offers attendees a little something special for those who want more than what is available at the open bar. Hosted next to your booth, this tasting will provide attendees with a unique taste of what San Diego has to offer.

### **| NEW IN 2018 | BARISTA BREAKOUT - \$1000**

Long day at the conference? Attendees are invited for a complimentary latte, compliments of your company, freshly brewed at your booth during the morning networking break.

### **| NEW IN 2018 | HYDRATION STATION - \$1000**

Your company's branded water refill stations will be located in major traffic areas with high visibility. Sponsorship also includes recognition on the conference website.

### **NETWORKING BREAKFAST - \$5000**

What's the most important meal of the day? Breakfast! Be recognized for jumpstarting everyone's day by sponsoring a hearty breakfast.

### **NETWORKING LUNCH - \$5000**

Attendees will be hankering for a protein pick-me-up to get them through the remainder of the day. They'll surely thank you for sponsoring the mid-day meal!

### **| NEW IN 2018 | MOBILE CHARGING STATION - \$5000**

More attendees are using smartphones, tablets and every other kind of device. By sponsoring a charging station they'll know you were the one that helped get their device through the day! Additionally, you'll be able to set up a promotional banner near the station.

### **VIDEO ADVERTISEMENT - \$1,000**

Sponsors are invited to submit a 45 second video advertisement shown prior to one of the general session speakers.

### **| NEW IN 2018 | ROOM KEY CUSTOMIZATION \$3,500**

Place your company logo or incorporate special messaging that directs attendees to your booth on a custom designed Marriott Marquis keycard.

# SPONSORSHIP AGREEMENT

## CONTACT INFORMATION

**NAME OF COMPANY** (as you would like it printed in conference materials)

**CONTACT PERSON** **TITLE**  
**PHONE** **EMAIL**  
**MAILING ADDRESS**

### ATTENDEES

**NAME** **TITLE**  
**CELL (FOR ONSITE)** **EMAIL**

**NAME** **TITLE**  
**CELL (FOR ONSITE)** **EMAIL**

**SPONSORSHIP LEVEL** **ADD ONS**  
Marquee \$30,000  
Platinum \$15,000  
Gold \$8,000  
Silver \$4,000

Payment information *Make checks payable to **TradePMR Group, Inc.***

Check # Credit Card:    Visa    MasterCard

Billing Contact

Card Number CVV                      Exp Date

Cardholders Name (Print) Signature

Address Associated with Card

## CONFERENCE PROGRAM ADVERTISEMENTS

Our sponsors will be listed on our conference website. Please provide a copy of your company logo and a link to your company website with this agreement for our Synergy2018 website.

The Marquee, Platinum, and Gold Sponsorships include an advertisement in the conference program. Trade-PMR must receive the print-ready ad copy no later than April 1, 2018. The advertisement should provide an overview of your company and services. The Marquee and Platinum Sponsorship ads should be no larger than 8" x 10.5". The Gold Sponsorship should be no larger than 8" x 5".

TRADE talk speakers must send their slides to Ellen Weintraub by May 1st for formatting.

Videos to be shown in the General Session must be submitted by May 1st.

## EXHIBITION RULES AND REGULATIONS

**Space Assignment:** Exhibit space will be assigned on a first-come, first-served basis. No space will be assigned until full payment is received. TradePMR reserves the right to shift space assignment after the contract has been signed if it becomes necessary to do so. Space is leased with the understanding that the exhibitor will hold TradePMR harmless and indemnify from any and all liability which may result from any cause.

**Payment:** Payment is due in full by April 13, 2018.

**CANCELLATIONS:** Any cancellation must be made in writing. This agreement cannot be cancelled after April 13, 2018. Before April 13, 2018 all credit card refunds will incur a 20% handling fee. After April 13, 2018, the exhibitor and/or signee are fully responsible for all charges as outlined on the front of this agreement whether the exhibitor uses the contracted space or not. Payment is due in full with this agreement.

**ARRANGEMENT OF EXHIBITS:** Exhibit booths are furnished with skirted tables, chairs, and a power source. The exhibitor must provide to TradePMR no later than April 13, 2018, a list of additional services or requirements, including equipment, furniture, electric requirements, etc. The additional services and requirements are the sole responsibility of the exhibitor and will be invoiced directly to the exhibitor by the hotel. The hotel may not accommodate requests made after April 13, 2018.

**PACKAGE ROOM:** A package room is available for receipt, holding, and delivery of packages to the exhibit showcase. Packages for functions may be delivered to the hotel up to one week prior to the event. Send packages to the following address:

Marriott Marquis San Diego Marina  
333 W Harbor Drive  
San Diego, CA 92101  
HOLD FOR (your Company Name)  
Synergy2018

All shipments and packages are handled by the UPS Store in the business center of the hotel. The exhibitor is responsible for all storage and handling fees charged by the hotel (list of prices available on request).



**General Restrictions:** The use of flammable and volatile materials is prohibited. This includes tanks and attached machinery and vehicles. All butane, propane, and/or any other kinds of flammable gas pressured vessel, including empty vessels, are strictly prohibited. Draping materials and other decorative materials must be flame-proof and comply with all state and local regulations. Exhibitors are prohibited from using amplifying equipment that is objectionable. Exhibitors must confine their activities to their contracted space. Exhibitors will not be permitted to use strolling entertainment or to distribute samples or souvenirs except from their own exhibit space. TradePMR reserves the right to require modifications of any questionable exhibitor.

**Liabilities:** The exhibitor agrees to hold harmless and indemnify TradePMR, its affiliates, employees, and agents and the hosting facility and its employees for any damages to, loss of, or destruction of the exhibitor's property or injuries to the exhibitor, its representatives, agents, or employees. The exhibitor expressly waives all claims for loss, damage, destruction, or injury. TradePMR and its affiliates will not be liable for failure to hold the exhibition as scheduled or for cancellation as a result of fire, or any act of nature, or the public enemy, or strike, or epidemic, or any law or regulation of public authority, or any other act beyond the control of TradePMR which makes it impossible or impractical to hold the exhibition. Any payment for booth space, less actual expenses incurred in connection with the exhibits, will be returned upon such cancellation.

**Insurance:** Exhibitors wishing to insure their materials, goods, and/or wares on display in the exhibit against damage by fire, accident, loss or liability of any kind, must do so at their own expense.

**Admissions:** TradePMR will have sole control over the admissions of persons. All persons visiting the exhibit area must be registered for the conference.

**Rules and Regulations:** Exhibitors will abide by all other provisions of these rules and regulations, with the fire regulations, and all other regulations of government agencies and the hosting facility. It is expressly understood and agreed by the exhibitor that the rules and regulations of the exhibit as issued or amended by TradePMR are hereby made an integral part of the contract and of the agreement between the exhibitor and TradePMR.

**Non-Competition:** As an exhibitor, you acknowledge and agree that the sale or unauthorized use or disclosure to any third party for any purpose of TradePMR's proprietary information constitutes unfair competition.

As an exhibitor, you agree not to engage in or participate in any unfair competition with TradePMR. Exhibitor agrees not to contact, directly or indirectly, the clients disclosed by Trade-PMR for purposes of soliciting business away from TradePMR or for introducing to clients any third parties who have any business interest which competes with TradePMR.

As an exhibitor, you shall not, without the prior written approval of an authorized officer of TradePMR, directly or indirectly, disclose proprietary information to any person or entity except for its employees, attorneys or accountants on a need-to-know basis or as may be required by law or regulation or demanded by any court or administrative agency.

We agree to comply with the exhibit regulations, instructions, and conditions as published with this agreement and with all conditions under which the facilities have been rented to Trade-PMR, Inc.

As an exhibitor, you acknowledge that all advertising materials are subject to TradePMR's review and may be required to be modified if such advertisements do not meet financial services industry standards.

By attending Synergy2018 (the "Event") you consent to TradePMR and its agents photographing and recording in video and/or audio the Event. By attending the Event, you irrevocably agree and consent that TradePMR has the right to use, publish, display and/or exhibit your image and/or voice, as well as your name, picture, photograph, portrait, silhouette, and/or other reproductions of your likeness at the Event (collectively, your "Image") and in connection with any advertising or promotional content, program, or material for TradePMR and/or TradePMR's business and projects, or for any other lawful purpose. TradePMR is not, however, obligated to make any use of your Image, name or likeness, or exercise any of the rights granted to it. You also understand that your image may appear in photos of the Event made available to you and all other attendees of the Event, and they may retain and distribute those photos.

Signature

Date

Printed Name

Title

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