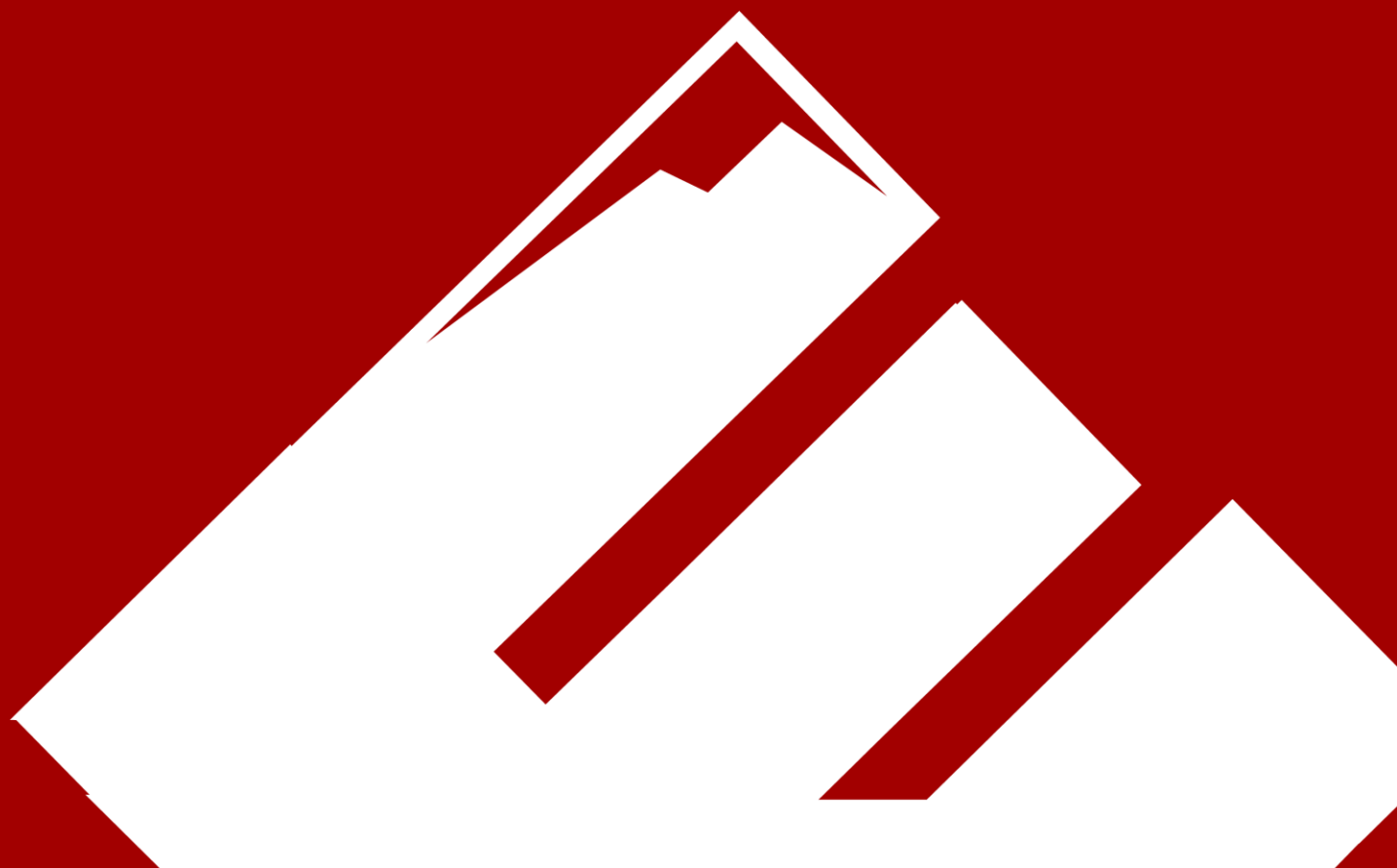


EXCEL 401 [K]

THE ADVISORS' CONFERENCE

2017 Ancillary Sponsorship Opportunities





2017 Sponsor Information

Thank you for participating in Excel 401(k): The Advisors' Conference!

Welcome to the team! In this packet, you will find all of the information necessary for you to get the most value out of your sponsorship.

Conference Dates

Sunday, October 22nd – Tuesday, October 24th

Location

Paris Las Vegas Luxury Hotel
3655 S Las Vegas Blvd, Las Vegas, NV 89109

Official Conference Website: www.Excel401k.com

The Partner Portal: <http://theadvisorsconference.com/sponsor-information.html>

At Rekon Intelligence (the parent company of Excel 401(k)), we know what it's like to be on the other end of a conference sponsorship. Our goal is to make this process as simple and easy as possible for all of our sponsors, so that you can focus on what's really important.

That's why we created the Partner Portal, one place for everything Excel.

- View all conference sponsorship information and guidelines.
- Review speaker/session information and guidelines.
- Check your company assets, including logo, description, exhibit table location, and conference contacts.
- Find your registration code and see how many people, and who, from your company have registered for the conference.
- Get up-to-date session information (not including session time slots).
- **View Attendee List** (updated automatically every 15min).
- Find venue, shipping and exhibit hall information.

You may also access the portal through the Excel 401(k) website menu by selecting "Partners" -> "Partner Portal" and using the password **excel401k**.



The Sponsor Process

5 Steps to a Successful Sponsorship

Step 1) Fill out the Sponsor Information Form.

- If you're reading this packet, you've most likely already completed this step! This short info form is designed to give us the right contact person for the right information, be it session information, marketing materials, or event logistics.
- If you'd like to check whom your contacts are, you may do so through the Company Info page in our Partner Portal.

Step 2) Complete the contact, pay the invoice, and select your exhibit table location.

- After the Sponsor Info Form is submitted, the conference contact and invoice will be sent to your Primary Contact automatically. Once completed, you'll be given a link to select your exhibit table location.

Step 3) Decide on ancillary sponsorships & add-ons.

- At Excel 401(k), there are numerous add-ons and ancillary sponsorship opportunities. Take a look at the available options and decide what would be most beneficial for your company early in the process. For more information, please review the Ancillary & Add-Ons page in this packet.

Step 4) Submit marketing assets & session/speaker information.

- Every sponsor level is required to submit a Company Description (100 words or less) and a Vector Logo (.ai, .svg, .eps, etc.) through the Submit Assets page in the Partner Portal. If you've worked with us before, we most likely already have information on file for your company. You can check this information via the Company Info page in the Partner Portal.
- Different sponsorships also come with certain marketing opportunities and speaking sessions. Review the Marketing and Session Information pages in this packet for more information.

Step 5) Register conference attendees.

- Every conference attendee must be registered, including sponsors. To check how many team passes come with your sponsor level and learn more about how to register, review the Registration Information page in this packet.



Marketing Materials

Marketing Assets based on Sponsorship Level

Each sponsorship level comes with different advertisements and promotions, as well as the ability to purchase additional items. To submit artwork, please visit the Submit Assets page in the Partner Portal.

Platinum Sponsors

Company Logo & Description

- Vector logo (.ai, .svg, .pdf or .eps format)
- Company description (100 words or less)

Full Page Conference Booklet Ad

- Live area: 7.5" x 10"
- Trim: 8.5" x 11"
- Bleed: 9" x 11.5"
- Preferred formats: INDD, AI, SVG, PDF
- Due: September 20th

Mobile Application Banners

- Mobile phone banner: 640 x 150 pixels
- Tablet/online banner: 552 x 150 pixels
- PNG, JPEG, and GIF only
- Due: September 27th

Breakout Screen Advertisement

- Full size: 6.5" width x 7.5" height
- Live area: 5.5" x 6.5"
- No bleed, no printers marks
- SVG, JPEG, PNG, GIF
- Max file size: 400 KB
- Due: October 4th

Newsletter Space (1 Promotion & 1 Ad)

- Promotion: 300px image, title, and text
- Advertisement: 600px image

Gold Sponsors

Company Logo & Description

- Vector logo (.ai, .svg, .pdf or .eps format)
- Company description (100 words or less)

Agenda Page Conference Booklet Ad

- Full Size: 3.5" x 2"
- At least 300dpi
- No bleed, no printers marks
- Preferred formats: AI, SVG, JPEG
- Due: September 20th

Newsletter Space (1 Promotion OR 1 Ad)

- Promotion: 300px image, title, and text
- Advertisement: 600px image

*Ancillary Add-Ons Available:

Mobile Application Banners (\$1,000)

- Mobile phone banner: 640 x 150 pixels
- Tablet/online banner: 552 x 150 pixels
- PNG, JPEG, and GIF only

Breakout Screen Advertisement (\$1,500)

- Full size: 6.5" width x 7.5" height
- Live area: 5.5" x 6.5"
- No bleed, no printers marks
- Max file size: 400 KB

Silver, Tech & Exhibit Sponsors

Company Logo & Description

- Vector logo (.ai, .svg, .pdf or .eps format)
- Company description (100 words or less)

*Ancillary Add-Ons Available:

Mobile Application Banners (\$1,000)

- Mobile phone banner: 640 x 150 pixels
- Tablet/online banner: 552 x 150 pixels
- PNG, JPEG, and GIF only
- Due: September 27th

Breakout Screen Advertisement (\$1,500)

- Full size: 6.5" width x 7.5" height
- Live area: 5.5" x 6.5"
- No bleed, no printers marks
- JPEG, PNG, GIF, animated GIF
- Max file size: 400 KB
- Due: October 4th

Download Templates

[Conference Booklet Advertisements](#)

[Mobile Application Banners](#)

[Breakout Screen Advertisements](#)

[Newsletter Advertisements](#)



Team Registration

Registering Your Team

To register for the conference, simply click “register” in the menu of the Partner Portal or Excel401k.com site and follow the instructions given. When you reach the payment stage, use your company discount code to receive free registration.

You may choose the option to register on behalf of a team member, or to register an entire group. In this case, you will still receive all communications regarding the conference, but do not have to be registered yourself.

What if I’m a sponsor and a speaker?

If someone is a part of a sponsor team, but is also speaking at a session, they must still use the discount code and register as a team member.

How many people can we bring?

Each sponsorship comes with a given number of free passes to attend. Beyond those, there are a limited number of additional spots available for \$750 each. To use these additional spots, simply register the attendees with the same discount code. After the conference, our team will determine the number of additional codes used and will send an invoice including the amount.

Platinum Sponsors

5 team passes, 5 additional available @ \$750 each



Gold Sponsors

3 team passes, 3 additional available @ \$750 each



Silver Sponsors

3 team passes, 3 additional @ \$750 each



Exhibit Sponsors

2 team passes, 2 additional @ \$750 each



Tech Sponsors

1 team pass, 2 additional @ \$750 each





Inviting Advisors

Excel 401(k) is an exclusive conference for successful advisors.

Below are invitation templates for Excel 401(k). Top advisors respond well to invitations to a neutral event from partners and sponsors. Review templates and make changes before sending.

Who may I invite?

Excel 401(k): The Advisors' Conference is designed for motivated advisors and their teams who are interested in doubling their practice. Advisors looking for a more engaging environment will love Excel!

Email Marketing Templates

Unless you've been given a custom discount code to use, please use the templates and discount codes provided below to invite your advisors.

Elite Advisors (\$1B+ AUM)

Click to download template files

Complimentary registration and 3 nights hotel

[HTML](#)

[Outlook Email](#)

[Text Document](#)

Select Advisors (\$250M+ AUM)

Click to download template files

Complimentary registration

[HTML](#)

[Outlook Email](#)

[Text Document](#)

General Invitation (HTML)

Click to download template files

\$150 off registration discount code

[HTML](#)

[Outlook Email](#)

[Text Document](#)

General Invitation (Plain-Text)

Click to download template files

\$150 off registration discount code

[HTML](#)

[Outlook Email](#)

[Text Document](#)



Breakout Sessions

Sessions Available Based on Sponsor Level

Platinum Control of one general session or combination of breakout sessions	Gold Control or participation in one or more breakout sessions	Silver Participation in one or more breakout sessions	Tech Control of one 15min Tech & Tools demo in the Tech Café
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Available Breakout Session Sponsorships:

General/Keynote Session

An hour-long session in front of the entire conference-- our most valuable session slot. Only two general sessions are available; these are reserved for Platinum sponsors only.

Super Session Partnership

Our Super Sessions are some of our highest rated sessions led by the brightest minds in the industry. This sponsorship includes partnering with an industry expert to create a truly valuable session.

45-min Breakout Session

Control of a 45-min time slot for your value-add content. Use a speaker from your company or pull from an outside source.

45-min Panel (Sponsor-Controlled)

This session allows full control over a 45-min panel. This might include choosing the content, moderator, speakers, or a combination of these.

35-min - 45min Panel (Participation)

The options here are endless: moderate a top-advisor panel, partner with advisors for a 45-min TED Talk session, sit on a topic-specific panel, assist in value-add content creation, or collaborate on a custom agreement for your participation.

30-min Breakout Session

Control of a 35-min time slot for your value-add content. Use a speaker from your company or pull from an outside source.

Tech & Tools Lab

Host a 15-min Tech & Tools Demo session in the Exhibit Hall. These are short, but extremely valuable sessions for both sponsors and attendees.



Session Information

Session Content & Approval

Session Topic Submission

Your session topic must be submitted to Trey@Rekonintel.com by Thursday, August 22nd. Based on the current agenda, your preferred topic may be rejected and an alternate session topic may be suggested to you. Please be aware of this, and make your selection with enough time to prepare your presentation.

Content Guidelines

All session content must be strictly value-add. Company promotions or advertisements may only be included at the end of sponsored sessions and may not take up more than 10% of the total presentation time.

Session and Speaker Details

Session information is due by Tuesday, September 12th, and speaker information is due by Wednesday, September 13th. Information submitted through the Submit Assets page may be updated any time prior to October 5th by contacting caroline@rekonintel.com.

After **Thursday, October 5th**, no adjustments may be made to your session information that will be reflected in print materials. Changes to online materials may be considered on a case-by-case basis.

Presentations

All presentations must be a PowerPoint file (.ppt) in the standard 4:3 size. Final presentations are due by Monday, October 2nd and may be submitted through our Submit Assets page in the Partner Portal. We highly recommend that you bring a second copy of your presentation to your session on a USB drive.

Content Approval

All session content and presentations must be approved by The Excel 401(k) Agenda Committee. For more information about session guidelines and for content suggestions based on last year's feedback, please contact:

Trey Dowdy, EVP Sales & Operations
trey@rekonintel.com
(910) 338-2659



Exhibit Hall Guidelines

What is The Conversation Center?

"The Conversation Center" is our name for the exhibit hall. The space is uniquely designed to give attendees and sponsors the best opportunity to connect by replacing big booths with 6' tables and maintaining a clean sight-line across the entire space.

Table Selection

All sponsors will be given a table in the exhibit hall. Sponsors may select their exhibit table location after both the paid invoice and signed contract have been returned. If you have not selected your exhibit table location, but feel that you meet these requirements, please contact Trey@RekonIntel.com.

Power Grid

No exhibit tables are guaranteed power apart from our Tech Sponsors, as the space will not be gridded. External power sources are not allowed. Please plan your exhibit table displays accordingly.

Exhibit Table Set-Up

Nothing higher than 24" is allowed on or next to any sponsor exhibit table. This gives our exhibit hall an open, welcoming, and conversation-enhancing feel. Here are a few ideas on what not to bring, and what you can bring:

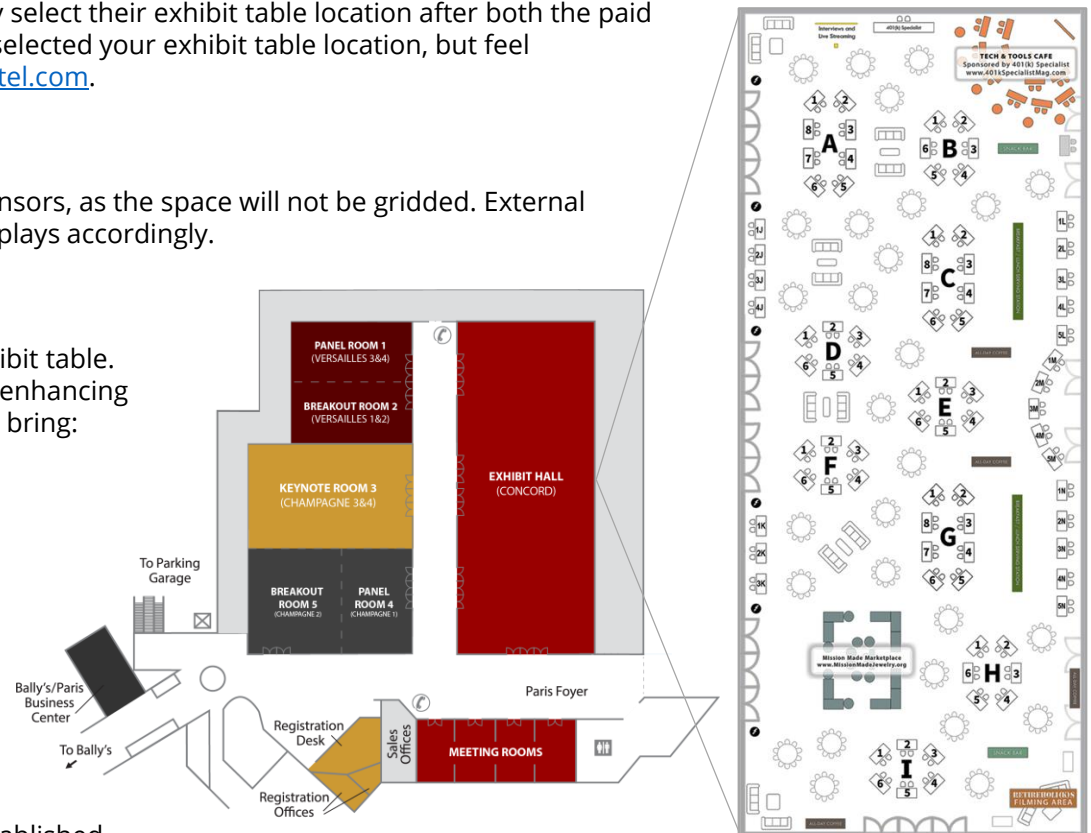
What **NOT** to bring:

- Standing Banners or Booths
- Table Displays, Signs, Posters, Pop-Ups or Wall Displays
- Large TVs, Lights, etc.

What you **CAN** bring:

- Table throws, Flyers and handouts
- Trinkets/merchandise
- Small table displays (laptops, 8.5x11 frames, etc.)

*Setup time is TBD. An email will be distributed as soon as it's established.





Sponsorship Add-Ons

Options to Enhance Your Sponsorship *All 3 Add-Ons are included with the Platinum Sponsorship Package

Breakout Screen Advertisements (\$1,500)

- Breakout screen advertisements utilize the time and space between breakout sessions (and in the exhibit hall) to promote your company. Each advertisement is displayed for 10 seconds on a loop in all breakout rooms before sessions begin.
- Full size: 6.5" width x 7.5" height, live area: 5.5" x 6.5"
- No bleed, no printers marks
- Accepted formats: JPEG, PNG, GIF, animated GIF, max file size: 400 KB
- **Submission Deadline: October 4th, 2017**

Conference Bag Deliverables (\$500)

- The conference bag deliverable add-on allows you to send marketing materials to be included in every attendee's conference bag.
- Max pages: 1, Max size: 8.5" x 11"
- Materials must be approved before shipping.
- Materials must be shipped by **Tuesday, October 12th** to:

Rekon Intelligence
Attn: (Company Name - Bag Deliverables)
210-3 Avondale Ave
Wilmington, NC 28403

Mobile Application Banners (\$1,000)

- Mobile app advertisements are displayed as rotating banners throughout the conference mobile app.
- **Submission Deadline: September 27th, 2017**
- Submissions must include both of the following:

Mobile phone banner
640 x 150 pixels, PNG, JPEG, and GIF only

Tablet/online banner: 522 x 150 pixels
522 x 150 pixels, PNG, JPEG, and GIF only



Ancillary Sponsorships

Take Your Attendee-Engagement to the Next Level

Advisor Lounge (\$5,000 for one, \$8,000 for two)

These high-traffic areas in the exhibit hall are perfect to promote your brand. Each advisor lounge can be designed to your specifications with signage, trinkets, and more.

All-Day Coffee Station (\$500 each or \$1,850 for all four stations)

Each of our All-Day Coffee stations will be turned into incredible advertising opportunities. Branded table skirts and signage create the perfect place to catch an attendee's attention.

Charging Station (\$3,000 for three or \$5,000 for all six stations)

Charging tables are the perfect place for a logo, and for sponsored reading material in the perfect high-traffic areas.

Candy Sponsor (\$2,500)

Over the past two years of running this conference, we've never brought enough candy! Branded candy pieces next to every breakout room door will go quickly, and will be an extremely popular (and delicious) way to promote your company.

Additional Ancillary Sponsorships

- Tuesday Night Party (\$10,000, may be split)
- Conference Bags (\$4,500)
- Wi-Fi (\$4,000)
- Name Badge Lanyards (\$3,500)
- Notes Pages in Conference Booklet (\$1,000)
- Water Bottles, Sponsor Provided (\$1,000)
- Pens, Sponsor Provided (\$1,000)

To inquire about any of these sponsorships, please contact Bryant Lester at bryant@rekonintel.com or (910) 795-1373.





Rekon Intelligence

Questions? Contact one of our Excel 401(k) sponsor team members below.

Conference Information / Sponsorships



Caroline Jacokes
Conference Director
caroline@rekonintel.com
(910) 795-0490

Sponsorships & Ancillary Opportunities



Bryant Lester
Head of BD & Sales
bryant@rekonintel.com
(910) 795-1373

Agenda Information & National Accounts



Trey Dowdy
EVP Sales & Operations
trey@rekonintel.com
(910) 338-2659

Rekon Intelligence, the parent company of Excel 401(k)

Rekon Intelligence brings the best topics, speakers, and presentations from our national conferences to 50+ locations across the country. As the number one provider of independent financial advisor events, Rekon helps thousands of advisors build their practices year after year.

About Us / Regional Events

Hosting financial advisor events isn't just part of our business, it is our business. Our entire team focuses on managing meetings. We understand your time is valuable, so strive to make every meeting valuable.

Since 2010, Rekon has hosted 800+ events for 22,000+ financial advisors. We've gained unique insight and experience about what advisors want. You can trust Rekon to manage events that deliver timely and relevant topics in an engaging environment.

We've learned that content, convenience, and credibility brings attendees to meetings. And we understand that efficiency and integrity attracts partners and speakers. Together Rekon creates a win-win environment for everyone. Attendees learn ways to further their goals, and partners have peace of mind knowing Rekon is handling all of the details.

Interested in sponsoring one of our regional events? Learn more at www.RekonIntel.com