

# 2023 MMI Distribution Leadership Forum

JUNE 22-23, 2023 | VIRTUAL

## GROUP PACKAGES

### SIGN YOUR TEAM UP FOR THIS UNIQUE VIRTUAL EVENT!

Get in on the action! MMI's Distribution Leadership Forum returns virtually on June 22-23, 2023. Join us as we bring together a who's-who of advisory industry distribution leaders—heads of distribution, national sales managers, key accounts and marketing professionals, home-office specialists, and top wholesalers—for two half-days packed with information, timely conversations, and actionable takeaways.

**Invite your team!** Discounted Group Packages make it easy—and economical—for your entire team to hear from our expert speakers, engage with industry peers, and learn ways to increase their skills and up their game!

### WHEN

**June 22-23, 2023**

10AM-1:30PM ET each day

### FORMAT

Virtual event with Live sessions and On-Demand playbacks.

### EXPECTED AUDIENCE

Several hundred forward-looking sales professionals from leading asset managers across the investment advisory ecosystem.

### PROGRAM

Four virtual sessions each day with an outstanding roster of speakers addressing critical topics that are top-of-mind for any distribution professional in today's extremely fluid competitive environment.

[View full Forum program.](#)

## REGISTRATION NOW OPEN

[LEARN MORE](#)

### ABOUT THE MONEY MANAGEMENT INSTITUTE

Established in 1997, the Money Management Institute (MMI) is the industry association representing financial services firms that provide financial advice and investment advisory solutions to investors. Through conferences, educational resources, and thought leadership, MMI facilitates peer-to-peer connections, fosters industry knowledge and professionalism, and supports

the development of the next generation of industry leadership. MMI member firms are dedicated to helping individual and institutional investors, at every level of assets, plan for and fulfill their financial goals.

For more information, visit [www.MMInst.org](http://www.MMInst.org).

# GROUP PACKAGES

THE MORE TEAM MEMBERS YOU SEND,  
THE MORE YOU SAVE!

## WITH THE ACCELERATED PACE OF CHANGE IN OUR INDUSTRY, SHOULDN'T YOUR DISTRIBUTION TEAM BE ON TOP OF THE LATEST INFORMATION, TRENDS, AND BEST THINKING?

Luckily, it has never been easier or more affordable to participate in the **MMI Distribution Leadership Forum**, a unique event built by—and for—investment advisory distribution professionals. The virtual format means more individuals from your firm can participate

right from their desk without the extra hassle and expense of travel. To facilitate broader participation and access to the conference content, MMI offers Group Packages for groups of 5 or more.

### CHOOSE THE PACKAGE THAT WORKS BEST FOR YOUR FIRM:

GROUP PACKAGE	TOTAL COST	PER PERSON COST	PER PERSON SAVINGS
50 PARTICIPANTS	\$8,900	\$178	40%
25 PARTICIPANTS	\$5,150	\$206	30%
15 PARTICIPANTS	\$3,550	\$237	20%
10 PARTICIPANTS	\$2,500	\$250	15%
5 PARTICIPANTS	\$1,325	\$265	10%
INDIVIDUAL	\$295	\$295	N/A

For **less** than the registration cost of sending 5 participants to 2022's in-person Distribution Leadership Forum, 25 members of your team can participate in this year's virtual event.\*

\* Based on the 2022 Early Bird registration fee of \$1,075.

#### 5 EASY STEPS:

1. **Contact MMI with any questions** at [events@mminst.org](mailto:events@mminst.org) or (646) 868-8500.
2. **Complete the Group Package Commitment Form** and send it to Lauryn Hughes at [lhughes@mminst.org](mailto:lhughes@mminst.org).
3. **MMI will invoice your firm and generate a custom registration code** for your firm's use.
4. **Share the code and conference registration link with your designated participants** so they can enroll.
5. **Upon enrollment, each participant will receive a personalized confirmation** with links to access the conference sessions.

#### EACH PARTICIPANT PASS:

- Includes **access to all live Forum sessions** on June 22-23 plus **on-demand session recordings**, and
- Is assignable to **one individual** and may not be shared or transferred.

# GROUP PACKAGE COMMITMENT FORM

## FIRM INFORMATION

Name of Company \_\_\_\_\_

Contact Name \_\_\_\_\_

Contact Title \_\_\_\_\_

Contact Email \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

## GROUP PACKAGE\* (SELECT ONE)

**50 PARTICIPANTS**

\$8,900

**15 PARTICIPANTS**

\$3,550

**5 PARTICIPANTS**

\$1,325

**25 PARTICIPANTS**

\$5,150

**10 PARTICIPANTS**

\$2,500

\*Each Group Package includes the designated number of Forum passes. Each pass is assignable to **one** individual and may not be shared or transferred.

## PAYMENT INFORMATION\*

Credit Card # \_\_\_\_\_

CVV \_\_\_\_\_ Exp. Date \_\_\_\_\_

Name on Card \_\_\_\_\_

Billing Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

**\*Payment by credit card is preferred.** If you are not able to pay by credit card, please check the box below and MMI will send you an invoice to be paid by check (payable to **Money Management Institute**) or by electronic funds transfer.

**Invoice Required**

## AUTHORIZED SIGNATURES

This signed commitment form is considered final and binding and can only be amended by mutual agreement of both parties in writing.

Purchasing Firm \_\_\_\_\_

Date \_\_\_\_\_

Money Management Institute \_\_\_\_\_

Date \_\_\_\_\_