

Money Management Institute's Thrive Initiative

The Premier Destination for Emerging Asset Managers (<25B AUM)

We are committed to serving the needs of Emerging Asset Managers and have established **Thrive**, a unique initiative by the Money Management Institute (MMI) to share connections, industry insights, and best practices to encourage growth of these organizations.

You've heard the expression: **so much to do, so little time**. This is an understatement for Emerging Asset Managers, and indeed their time is precious. In the sea of phone calls, emails, and meetings, managers are faced with digesting the myriad of challenges the industry continues to deliver. Whether addressing questions related to regulatory pressures, fee compression, new product launches, custodial trends, or platform gates, there continues to be a need for firms to engage market intelligence, emergent trends, and peer discussions.

Identifying needs of Emerging Asset Managers presents an opportunity for MMI to foster a destination where the ecosystem is built to **engage, support, and reinforce** the success of its members. Our goal is to **provide focused content, drive opportunities, and help firms get ahead** in these challenging times.



Steering Council



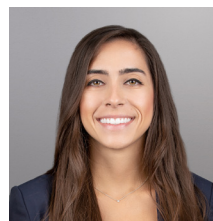
Robbie Cannon
Co-Chair

Head, MMI EAM Thrive Initiative
Money Management Institute



Bonnie Belskis
Co-Chair

Director of National Accounts
Confluence Investment Management



Tiana Brenneise

Director of National Accounts
Sierra Mutual Funds & Ocean Park Asset Management



Steve Carl

Principal, Chief Distribution Officer, Chairman of the Executive Committee
Madison Investments



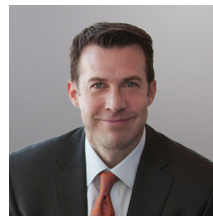
Heather Lindsey

Head of Distribution
Crossmark Global Investments



Robert Miller

CEO
Frontier Asset Management



Mark Rewey

Managing Director
Segall Bryant & Hamill



Frequently Asked Questions

Who should join?

MMI welcomes all industry professionals with “corporate roles” that have an interest or direct responsibility within an emerging asset manager. Whether you are in a marketing, distribution, research, product, technology, investing or other similar role, we welcome your engagement. This community is exclusive to MMI member firms.

What is the difference between the MMI Emerging Asset Manager Community and Thrive?

MMI’s Emerging Asset Manager Community is designed for managers with less than \$25 billion AUM who are looking to enhance distribution, gain insight, and share perspectives on the industry. Every year, the EAM Forum offers the unique opportunity for managers to meet face-to-face with gatekeepers of leading firms through small-group roundtables. Thrive is more than a forum, it is an enhancement of all the EAM Community offerings, with a broader platform and extra access to exclusive content and events. All leadership, content and ideas are driven from our Thrive Steering Council and are executed through the EAM community calls.

How often do we meet?

We plan to host three community calls a year (in February, July, and November) with a large in-person Thrive event April 17-18, 2024 in New York City. The expectation is there will be more programming for 2025.

What are the priorities and what should I expect?

You can expect MMI’s Thrive initiative will give you access to an ecosystem built exclusively to help foster growth, resources, and ideas to aid your firm’s development. We have events with industry-leading gatekeepers and content curated by your peers. We are a community of asset managers gathering for the good of each other and the industry.

More questions? Contact:

Arlen Oransky
(646) 868-8505
aoransky@mminst.org

Robbie Cannon
(704) 562-9163
rcannon@mminst.org

