



INVESTMENTS & WEALTH

# EXPERIENCE

JW MARRIOTT, AUSTIN, TX | MARCH 30-APRIL 2, 2025

[iwicentral.org/EXP25](http://iwicentral.org/EXP25)

## About the Investments & Wealth Experience

Experience 2025 is the Investments & Wealth Institute's largest in-person event of the year. The conference will focus on the latest trends and insights in investment, wealth, retirement planning and management. Advisors in attendance will be looking for new strategies, techniques, and knowledge to increase their success, build the strength of their practices, and better serve their clients.

Since 1985, the Investments & Wealth Institute has served as a 501(c)6 non-profit membership society, education provider, and standards body for the financial advice profession.

## Expected Advisor Attendees by Firm

**WIREHOUSE: 35%**

**RIA: 26%**

**NATIONAL & REGIONAL: 14%**

**HYBRID RIA: 13%**

**IBD: 10%**

**RETAIL BANK: 1%**

**INSURANCE BD: 1%**



**EXPECTED ATTENDANCE  
600+**



**EXPECTED ADVISOR AVERAGE AUM  
\$364 Million**

## Sponsors

- **Solo Super Session: \$48,000**  
60-minute speaking opportunity, 3 sessions running concurrently
- **Solo Breakout Session: \$40,000**  
60-minute speaking opportunity, 4 sessions running concurrently
- **Pre-Conference Session: \$38,000**  
120-minute speaking opportunity, 2 sessions running concurrently
- **Ed Talk Session: \$25,000**  
25-minute speaking opportunity during lunch and/or breaks
- **Women in Wealth Session\*: \$25,000**  
60-minute panel speaking opportunity at luncheon
- **Panel Breakout Session: \$22,500**  
60-minute panel speaking opportunity, 4 sessions running concurrently

## Exhibitors

- Exhibitor: \$15,000

## Social

- Sponsored Reception Entertainment: \$20,000
- Next-Generation Reception\*: \$20,000
- Premium Lounge: \$10,000
- Sponsored Reception: \$10,000

## Food + Beverage

- Elevated Coffee Station: \$15,000
- Lunch: \$7,500
- Breakfast: \$7,500
- Break Station: \$7,500
- All-Day Beverage Station: \$5,000

## Giveaways + Services

These elevated opportunities are only available for Sponsors and Exhibitors

- Lanyards: \$10,000
- Room Drop: \$10,000
- Key Card Packets: \$10,000
- Wifi Splash Page: \$5,000

\*All proceeds for these sponsor opportunities support the Investments & Wealth Foundation

For more information, please contact:

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