

INVESTMENTS & WEALTH STRATEGY FORUM 2025

NEW YORK MARRIOTT MARQUIS, TIMES SQUARE
November 16 - 18, 2025

Position your brand at the forefront of wealth management innovation by sponsoring the IWI 2025 Strategy Forum. This exclusive event is designed for seasoned professionals looking to stay ahead in an ever-evolving landscape. By aligning your brand with this premier gathering, you'll connect with top-tier wealth and investment managers seeking cutting-edge insights in investment, wealth management, and retirement education. We offer a wide range of sponsorship opportunities tailored to maximize your brand's visibility, from keynote presentations and breakout sessions to networking events and exhibition space. Showcase your solutions as industry leaders explore advanced strategies to grow both their clients' portfolios and their own businesses. Don't miss this chance to position your brand at the forefront of financial innovation and thought leadership.

Expected Attendance: 350

Advisor Attendee



**Average AUM
\$364 Million**

WIREHOUSE: 35%

RIA: 26%

NATIONAL & REGIONAL: 14%

HYBRID RIA: 13%

IBD: 10%

RETAIL BANK: 1%

INSURANCE BD: 1%

Presenting Sponsors

- Pre-conference: \$35,000
- Solo breakout session: \$30,000
- Panel breakout session: \$20,000
- Women in wealth luncheon: \$15,000
- Meet the manager: \$5,000

Exhibitors

- Exhibitor: \$10,000
- Fintech: \$7,000

Social + Food/Beverage

- Sponsored reception: \$10,000
- Sponsored breakfast: \$7,500
- Sponsored lunch: \$7,500

Giveaways + Services

- Key card packets: \$10,000
- Wifi splash page: \$5,000

For sponsorships, please contact:

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