

University Conference Services



MID-SIZED

RETIREMENT & HEALTHCARE

PLAN MANAGEMENT CONFERENCE

Educational
conferences
focused
on key
retirement
plan and
healthcare
benefit
issues
for
mid-sized
employers



Showcase Your Firm's Expertise

Become a sponsor of the premier educational
conference series for plan sponsors

SAN FRANCISCO

March 20-23, 2016
Palace Hotel

CHICAGO

June 14-17, 2016
Radisson Blu Aqua Hotel

ORLANDO

May 1-4, 2016
The Ritz-Carlton Orlando,
Grande Lakes

LAS VEGAS

September 25-28, 2016
The Cosmopolitan of Las Vegas



Reach Your Target Audience

GET FACE-TO-FACE WITH EXECUTIVE DECISION MAKERS

The middle market is the largest segment of the plan sponsor community. Our conference attendees are senior-level HR, benefits and finance professionals with decision-making authority for plans with assets of \$5 million to \$1 billion.

Participant titles commonly include:

- Vice President of Human Resources
- Director of Human Resources
- Director of Compensation and Benefits
- Vice President of Finance
- Chief Financial Officer
- Treasurer

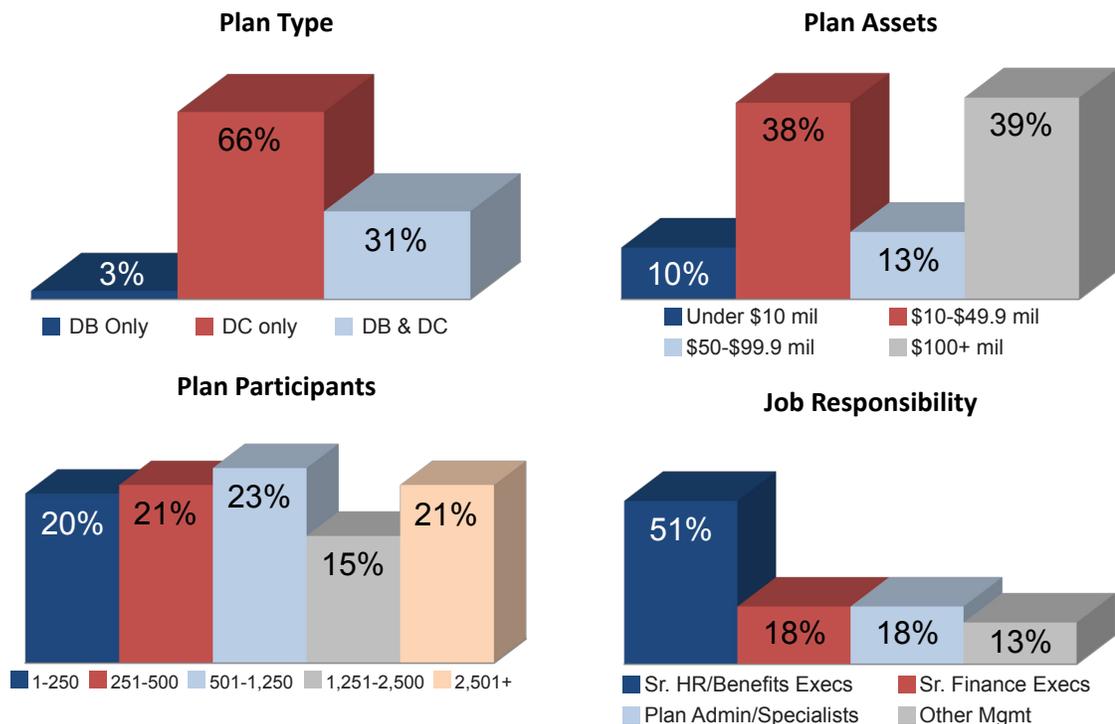
EDUCATIONAL FORMAT & NETWORKING OPPORTUNITIES

The 2½-day conferences feature a comprehensive schedule of workshops covering the full range of issues that employers face in managing their two most expensive and complex benefit plans—retirement and healthcare. **Sponsors play a prominent role in the program as workshop presenters.** Sponsor display tables, breaks, luncheons and evening receptions provide excellent opportunities for conference sponsors and participants to meet and talk face-to-face.

SHARE YOUR KNOWLEDGE

Speaking opportunities and networking forums place you in front of your target audience. The educational format allows you to present workshops to employers on topics in your area of expertise. Receptions offer a chance to display your company's product offerings and talk to attendees one-on-one.

2015 Audience Demographics



CHOOSE YOUR LEVEL OF EXPOSURE

Multiple sponsorship levels are available to suit your budget and the amount of exposure your company desires.

NATIONAL SPONSORSHIP

Limited availability

- The opportunity to present or participate in high-profile plenary-level sessions
- Recognition as National Sponsor on UCS homepage, individual conference webpages and at each venue
- A minimum of two educational workshop presentations per conference
- The opportunity to present two 1-hour UCS-promoted webinars in 2016
- Mobile app banner ad for each 2016 conference where you have a keynote speaker
- Four full conference registrations for your representatives
- Deeply discounted fees of \$500 each for up to four additional staff members
- Additional exposure on UCS website and e-newsletters for your white papers, research, etc.
- Eight complimentary registrations for your plan sponsor clients and prospects
- Preferential placement for your tabletop exhibit space
- Discount on the combined pricing for sponsorship of the four individual 2016 *Mid-Sized Retirement & Healthcare Plan Management Conferences*

LEVEL 1 SPONSORSHIP

Limited availability

- The opportunity to present or participate in plenary-level sessions
- High-profile visibility for your keynote speakers in the conference brochure and on the website
- Two educational workshop presentations
- Three full conference registrations for your representatives
- Deeply discounted fees of \$500 each for up to three additional staff members
- Two complimentary registrations for your plan sponsor clients and prospects

LEVEL 2 SPONSORSHIP

- Two educational workshop presentations
- Three full conference registrations for your representatives
- Deeply discounted fees of \$500 each for up to three additional staff members
- One complimentary registration for your plan sponsor client or prospect

LEVEL 3 SPONSORSHIP

- One educational workshop presentation
- Two full conference registrations for your representatives
- Deeply discounted fees of \$500 each for up to two additional staff members

All sponsorships include:

- The exclusivity of being one of approximately 25 sponsoring organizations of one of the most respected conferences in the employer-sponsored benefit plan arena
- A unique registration policy that restricts enrollment exclusively to plan sponsors. Non-sponsoring vendors cannot attend
- Prominent use of company logo in conference brochure
- National exposure to plan sponsors with plan assets of \$5 million or more through direct mail campaigns
- Company logo on conference website with link to your website
- Company logo, description and contact information in conference program material
- Prominent use of company logo on conference pocket schedule and on-site signage
- Tabletop exhibit space, including a custom-made sign with your logo
- Profile page on conference mobile app
- The ability to offer your plan sponsor clients and prospects a \$200 discount on the registration fee
- Ready-to-use, customized message to offer your clients the \$200 discount OR the option for us to handle the mailing for you
- Pre-conference attendee list with names, addresses AND plan asset and plan participant information
- Ready-to-use post-conference attendee list with contact information
- Ongoing exposure to attendees through the posting of Sponsor's conference presentations on the website

99%

of past
attendees
would
recommend
this
program
to a
colleague

About Us

Conference Organizer: University Conference Services



- UCS is based in Research Triangle Park, North Carolina.
- We have nearly 25 years' experience in developing, organizing and producing executive education conferences and seminars in conjunction with leading business schools.
- UCS manages four national *Mid-Sized Retirement & Healthcare Plan Management Conferences* each year that attract financial and human resource professionals.

Our Academic Partner: University of North Carolina's Kenan-Flagler Business School



- The University of North Carolina's Kenan-Flagler Business School is one of the 10 major providers of university-based general management programs for U.S. executives.
- Kenan-Flagler's executive education custom programs are ranked among the best in the world—#6 by *The Wall Street Journal*, #9 by the *Financial Times* and #13 by *BusinessWeek*.

2015 Sponsors Include:

Buck Consultants
Dietrich and Associates, Inc.
Fidelity Investments
Lincoln Financial Group
MassMutual Retirement Services
MetLife
Millennium Trust Company
Milliman
NFP Retirement

Pacific Life Insurance Company
P-Solve
Pyramis Global Advisors
SageView Advisory Group
SEI Investments
SWBC Investment Advisory Services
Transamerica Retirement Solutions
Vanguard
Virtus Investment Partners/
Newfleet Asset Management

"The *Mid-Sized Retirement & Healthcare Plan Management Conference* allows me to spend two and a half days with peers to get relevant information to benefit our plan participants. The sessions are on issues we are facing now or will be in the near future. It is one of the best uses of funds I spend all year."

George A. DeBord
Chief Financial Officer
Oriana House

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