

2025 Cramer Roundtable Sponsorship

THE CRAMER ROUNDTABLE SERIES

SPONSORSHIP AGREEMENT

What makes our Roundtables different?

In many ways our Roundtables are the same as every other roundtable you've attended. But there are some important ways that our Roundtables are different.

The Right Number and Right Mix of Participants and Sponsors

We have found that 15-25 Participants is large enough to ensure broad diversity of opinion and experience while still small enough to create an atmosphere of camaraderie and openness. When instances occur due to regulatory concerns or an increased focus industry-wide we do reserve the right to include additional Participants due to additional demand. We have also found that limiting the number of people representing Sponsors keeps the focus on the topic and on the Participants.

Full Participation by Everyone

At our Roundtable we expect and make every effort to facilitate a high degree of sharing. When everyone shares a bit more than they normally would, everyone leaves the Roundtable significantly wiser. No one is allowed to take notes and not share. Everyone must talk. Everyone is informed that "The price of admission is your active participation."

Personalized Agenda

We will spend at least 30 minutes on the phone with every participant before they arrive at the Roundtable. We will ask them what they want to talk about and use that information to build the Agenda. We will learn about some of their recent initiatives that might be of interest to other participants and ensure they talk about those experiences during the Roundtable. And we will educate them about what to expect and the importance of asking questions and sharing best (and worst) practices with the rest of the group.

Sometimes it's useful to define something by describing what it isn't.

To that end, this is what a Cramer Roundtable is **not**:

- It is **not** a series of PowerPoint presentations.
- It is **not** a soapbox for any one participant or sponsor.
- It is **not** a conference where you listen, take notes, and leave.

ROUNDTABLE MISSION

Our Roundtables are designed to share best practices and network with peers about the challenges and opportunities we all face with our technology decisions, business process initiatives and regulatory challenges.

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Opportunities for Sponsors

- **Invitations** to distribute to Clients, Prospects and Centers of Influence as you see fit. Each Invitation includes free airfare, hotel and food for the duration of the Roundtable.
- **1 or 2 Seats at the table** for members of your team. This number is strictly enforced in order not to overwhelm participants and to maintain an atmosphere of candor and openness among participants.
- **Active participation** in all conversations. You bring a great diversity of experiences across many clients and projects, so please feel free to share those experiences with everyone. Please don't think that just because you are a sponsor you should be seen but not heard.
- **Branding** on all Roundtable materials
- **Input into the Agenda** topics and the selection of Panel Discussions or Case Studies
- **Complete List of all Participants** and their contact information.

Responsibilities of Sponsors

- Sponsorship Fee of **\$11,500** for one attendee, **\$14,500** for two attendees. Billed in advance of Roundtable. Due before the Roundtable begins.
- Work with Todd and Jack and other sponsors to find the right mix of participants.
- Airfare and hotel expenses for your firm's attendees. You can use rooms from our reserved block of rooms at our reduced conference rate, but you are responsible for paying for the rooms upon arrival.

2025 Cramer Roundtables

SPRING 2025

MAR 19 COMPLIANCE, OPS. & TECH

MAR 20 MANAGED MONEY

APR 10 ANNUITIES

APR 30 INSURANCE

MAY 1 EMPOWERING WOMEN **NEW!**

FALL 2025

SEPT 11 SALES MANAGEMENT

SEPT 25 ANNUITIES

OCT 9 STRUCTURED PRODUCTS

NOV 13 INSURANCE

DEC 4 LEADERS & CHAMPIONS
Invitation only

I am happy to invite you to sponsor a **Cramer Roundtable**. I hope you will be able to join us.