



Ascent 2025

Sponsorship Prospectus

**Powering Advisors.
Winning for Investors.**

Sponsorship Opportunities: sponsorships@orion.com

Our Mission
**We are building a wealth-tech
community where every advisor and
investor thrives.**



Strategic Pillars

Pioneering Technology

Reliable Systems and Support

Comprehensive Wealth Solutions

Flexible Ecosystem

Growth Resources

Our Values

**Create raving fans • Innovate Always
See It Through • Support One Another**

Orion's Scale

6.5M

Technology Accounts



\$72.5B

Wealth Management Assets



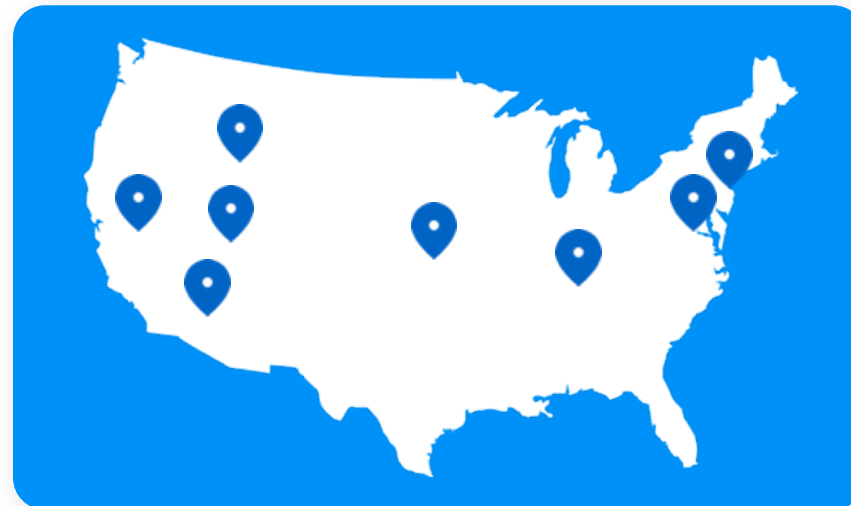
2,400

Independent Advisory Firms



\$4.7T

Platform Assets



25,000

Firms that
Redtail's 114,000+ users
are affiliated with

Powering
advisors.

Winning for
investors.

2024 Ascent

\$1T+

Attendee Assets on Orion platforms

1,635

Attendees

42%

Tech Attendees
(Mainly RIAs, \$500M+)

15%

Wealth Management
Advisors



110

Exhibitors & Sponsors

613

Consultation
Appointments

128

Speakers with
90+ presentations

*As of 3/6/2024

Called a **“best conference for financial advisors”** by Michael Kitces¹ and Three Crowns Marketing.²

¹Source: [The 10 Best Financial Advisor Conferences To Attend In 2024](#), Kitces.com, 2023.

²Source: [Top 10 Conferences for Financial Advisors in 2024](#), Three Crowns Marketing, 2023.

2025 Premier Partner

\$250,000

Annually (4 available)

Orion Ascent Conference

EXHIBIT

- 20x20 booth space
- Opportunity to purchase additional 10x10 units for additional fees
- First selection of exhibitor booth placement
- Kiosk in Tech Village (integration partners only)
- Four lead scanning licenses included for booth

ATTEND

- 10 conference registrations (includes speakers)
- Opportunity to purchase unlimited additional full-conference or day-pass registrations at published rate
- Invitation to attend sponsor receptions
- Access to all Elite Advisor events and spaces

SPEAK

- **Main Stage:**
Shared main stage session with Orion*
- **Breakout Session:**
Opportunity to nominate a presenter for a 40-minute educational session*
- Session content included in Ascent On-Demand post-conference site

ACTIVATE

- Exclusive sponsorship of one Elite Advisor pre-conference or conference event/activation
- Opportunity to own an activation or area at the final night event
- Opportunity to own an activation or area in the Exhibit Hall

PROMOTE

- Choice of sponsorship on one of the following items (first-come, first-serve): Mobile App Home Screen, Conference WiFi, Registration Check-In Screen, Day 1 Coffee Sleeves, Day 2 Coffee Sleeves
- Premier logo placement in select conference print, electronic and on-site branding
- Mobile app banner advertisement
- One push notification to all conference attendees
- One appreciation social media post during conference
- “Blurb” in Orion client newsletter leading up to conference
- Pre-event and post-event conference opt-in attendee list, including email addresses
- Opportunity to provide SWAG in Elite Advisor Lounge

ACCESS

- 30-minute 1:1 with Orion CEO
- 30-minute 1:1 with one additional Orion executive or board member
- Opportunity to host one 30-minute pre-conference meeting with Orion sales team members

SUPPORT

- Dine-around at the hotel with a credit of \$5,000 included in your sponsorship. Orion will provide a concierge to coordinate. Additional costs to be covered by sponsor. Orion executive or board member to attend dine around.

2025 Events

- Sponsorship of one exclusive event and two standard events. Choices include:
Exclusive Events
 - 2025 Wealth Management Elite Event
 - 2025 FUSE Summit
 - 2025 Wealth Management Advisory Council In-Person Meetings
- **Standard Events**
 - 2025 Wealth Management Territory Town Halls
 - 2025 Redtail University
 - 2025 Align University

Marketing Placements

- Sponsor of one quarter’s worth of episodes of your choice of one of Orion’s podcasts. Choose from Standard Deviations, The Weighing Machine, Weighing the Risks or The Fuse Show
- Two targeted emails
- One social media share/quarter
- One dedicated webinar with pre-event and post-event opt-in attendee list
- Quarterly featured content downloads housed in Orion’s Online Resource Center and promoted in client newsletter with link + leads list and quarterly engagement reports
- Monthly guest blog authored by sponsor and posted in Orion’s online resource center
- One featured guest opportunity in our ongoing value-add content (webinars, podcasts, videos, etc.)*
- Dedicated partner page on orion.com

Orion Advisor Academy

- Featured provider of 1 CE course each quarter
- Opportunity to “own” a specific topic tied to your brand/strategy/expertise
- Monthly list of opt-in enrollees in sponsored courses
- Premier logo placement in select branding
- Resource Center listing
- Course available for 3-years with once annual updates

Partner Support

- Dedicated Marketing Manager to support success
- Monthly marketing planning meetings to identify co-marketing and content syndication opportunities
- Quarterly marketing engagement reports
- Monthly status report of all ongoing effort/initiatives

Orion Team Access

- Opportunity to attend one Wealth Management or Technology sales meetings
- Opportunity to present at two of either the Wealth Management or Technology weekly sales meetings
- One strategy meeting with Orion executive team

Wealth Management Data Package

- Reduced pricing available

* Topic, speaker, title and description to be agreed on with Orion

ASCENT 2025

Sponsorship Packages

Supernova Sponsor

\$80,000 (15 available)

EXHIBIT

- 10x20 booth space
- Opportunity to purchase additional 10x10 units for additional fees
- Second selection of booth placement
- Kiosk in Tech Village (integration partners only)**
- Two lead scanning licenses included for booth

ATTEND

- Six conference registrations (includes speakers)
- Opportunity to purchase up to four additional conference registrations at published rate
- Invitation to attend sponsor receptions

SPEAK

- **Breakout Session:**
Opportunity to nominate a presenter for a 40-minute educational session*
- **Panelist:**
Opportunity to nominate 1 panelist for a 40-minute educational session*
- Session content included in Ascent On-Demand post-conference site

PROMOTE

- Priority logo placement in select conference print, electronic and on-site branding
- Mobile app banner advertisement
- Pre-event and post-event conference opt-in attendee list, including email addresses
- First option to sponsor additional Exhibit Hall activations

ACCESS

- 30-minute 1:1 with a Senior Leader at Orion (SVP, EVP or above) on pre-conference day.

SUPPORT

- Dine-around coordination concierge (sponsor pays for event)

Solar Sponsor

\$55,000 (10 available)

EXHIBIT

- 10x10 booth space
- Opportunity to purchase additional 10x10 units for additional fees

ATTEND

- Four conference registrations (includes speakers)
- Opportunity to purchase up to four additional conference registrations at published rate

SPEAK

- **Panelist:**
Opportunity to nominate 1 panelist for a 40-minute educational session*

PROMOTE

- Logo placement in select conference print, electronic and on-site branding
- Mobile app banner advertisement
- Pre-event and post-event conference opt-in attendee list, including email addresses

SUPPORT

- Dine-around coordination concierge (sponsor pays for event)

Lunar Sponsor

\$30,000 (50 available)

EXHIBIT

- 10x10 booth space

ATTEND

- Three conference registrations
- Opportunity to purchase up to four additional conference registrations at published rate

PROMOTE

- Logo placement in select conference print, electronic and on-site branding
- Pre-event and post-event conference opt-in attendee list, including email addresses

Stellar Sponsor

\$15,000 (35 available)

EXHIBIT

- Kiosk in Tech Village**

ATTEND

- Two conference registrations
- Opportunity to purchase up to four additional conference registrations at published rate

PROMOTE

- Logo placement in select conference print, electronic and on-site branding
- Pre-event and post-event conference opt-in attendee list, excluding email addresses

* Topic, speaker, title and description to be agreed on with Orion

** Orion to assign kiosk location

Additional Opportunities

Events & Content

Opening Night Welcome Dinner Reception & Dinner: \$25,000 (1 Available)

- Seize the opportunity to be the host of the Orion Ascent Conference opening night welcome reception and dinner, showcasing your brand's commitment to advisors throughout the exhibit hall. You'll benefit from extensive brand exposure, a five-minute welcome speech and networking opportunities.

Exhibit Hall Demo: \$9,500 (15 available)

- Maximize your brand's visibility in the exhibit hall with a dynamic 20-minute presentation on a massive 8x20-foot LED screen. You have the choice on the content—whether you're launching new technology, educating advisors about your products, or offering valuable educational content. This is a prime opportunity to captivate and engage the audience with your latest innovations and expertise.

Block Party Restaurant Buy-Out: \$20,000 (3 Available)

- Sponsor the exclusive buyout of a renowned restaurant for the Ascent block party to deliver the ultimate brand activation. As a sponsor, create an unforgettable evening, immerse attendees in a vibrant atmosphere, and showcase your brand's exceptional

hospitality. Enjoy customized branding and direct engagement with a diverse audience, ensuring a memorable and impactful presence at the conference.

Promotions

Water Bottles: \$15,000 (SOLD)

- Make a lasting impact by sponsoring the official water bottle at the conference. Your logo will be prominently displayed on every bottle ensuring repeated exposure throughout the event.

Hotel Key Cards: \$15,000 (SOLD)

- Unlock unparalleled brand exposure by sponsoring the hotel key cards. With your logo prominently displayed on every card, your brand will be in the hands of every attendee.

Hotel Room Gift Drop: \$10,000 (2 available)

- Give attendees a surprise upon arrival by sponsoring a hotel room gift drop, creating a unique and memorable experience that best represents your brand. Giveaway item is an additional fee.

Head Shots: \$20,000 (1 available)

- Provide a valuable service while gaining widespread exposure for your brand by sponsoring professional head shots for attendees.

Dine Arouds: \$2,500 (10 available)

- Host attendees for dinner at one of the many exceptional restaurants near the event property. Pre-attendee lists of advisors who have opted to share their contact information will be available.

Activation Bar \$9,500 (2 available)

- Attendees will associate you with firm's the featured food and drink throughout the event. Gourmet coffee, gourmet snacks, cocktails, and more will be distributed from this bar in the exhibit hall throughout the day and in the reception.

Lanyards: \$20,000 (SOLD)

- What better way to leave an impression than to see 2000+ participants wearing your firm's name/logo around their neck for the duration of the conference? Name badge lanyards are worn by each attendee to gain access to all conference events

Environmental Branding: Cost Varies

- Integrate your brand into the very fabric of our event environment. Your branding will be prominently featured throughout the hotel, ensuring consistent visibility and engagement with all attendees, from the lobby to the event spaces. Inquire for opportunities and costs

Connect

1:1 Appointments: \$2,750

- Maximize your connection with attendees by making yourself available for 1:1 appointments over the duration of Ascent 2025. Customize your availability and topics that you offer attendees. Attendees can then schedule meetings with you through the mobile app

Private 1:1 Meeting Nook: \$9000

- Enhance your 1:1 meetings and branding at Ascent with a private meeting nook. These nooks are able to be branded and provide you a space to sit down with attendees separate from your booth.