



# Ascent 2025

Sponsorship Prospectus

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**Powering Advisors.  
Winning for Investors.**

Sponsorship Opportunities: [sponsorships@orion.com](mailto: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



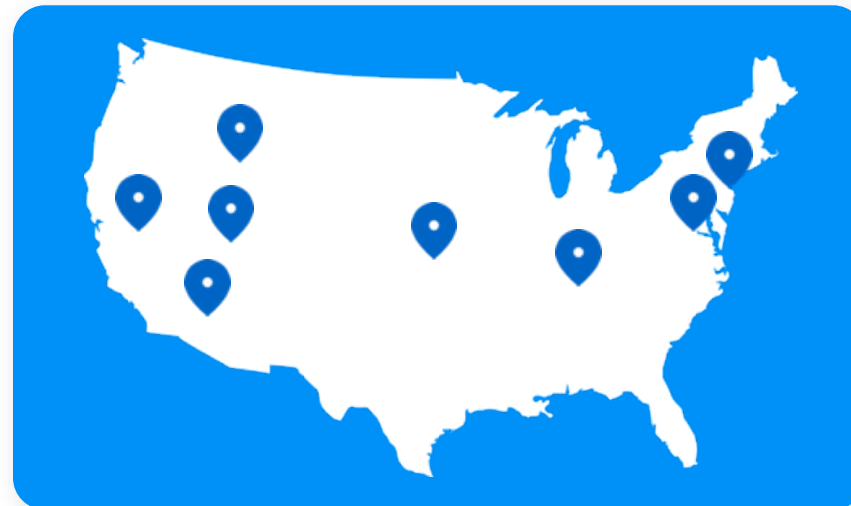
**2,400**

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 Kitces<sup>1</sup> and Three Crowns Marketing.<sup>2</sup>

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

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

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



# Marketing Partnerships

2025 Prospectus

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**Powering Advisors.  
Winning for Investors.**

# 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

# 2025 Platinum Partner

**\$150,000**

Annually (4 available)

## Ascent Solar Sponsor

### 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)

## 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

## Wealth Management Data Package

- OPS & Brinker proposals including the advisor's name, email, phone, city, state, and zip. Other details shared are BD name, proposal amount, % allocation, and model name.
- Access to the Monthly "What's Hot" webinar data with valuable data flow analysis
- Webinar data includes flows percentages and top 10 models ranked by 3mo, YTD, and 1 year. Data is categorized by benchmark, mandate, firm size, model type, and asset class.
- Reports available in your portal.

## Marketing Content & Promotion

- 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 sponsor and speak for 30-minutes at 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



# 2025 Gold Partner

\$100,000

Annually (8 available)

## Ascent Lunar Sponsor

### 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

## 2025 Events

- Sponsorship of Two standard events (see event inventory for additional information)  
**Standard Events**
  - 2025 Wealth Management Territory Town Halls
  - 2025 Redtail University
  - 2025 Align University

## Data Package

- OPS & Brinker proposals including the advisor's name, email, phone, city, state, and zip. Other details shared are BD name, proposal amount, % allocation, and model name.
- Access to the Monthly "What's Hot" webinar data with valuable data flow analysis
- Webinar data includes flows percentages and top 10 models ranked by 3mo, YTD, and 1 year. Data is categorized by benchmark, mandate, firm size, model type, and asset class.
- Reports available in your portal.

## Marketing Content & Promotion

- One targeted emails
- Two social media share/year
- 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
- Dedicated partner page on orion.com

## Orion Advisor Academy

- Featured provider of 1 CE course each year
- 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

- Quarterly 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 present at one of either the Wealth Management or Technology weekly sales meetings

# 2025 Silver Partner

**\$50,000**

**Annually (8 available)**

## Marketing Content & Promotion

- One targeted emails
- Two social media share/year
- 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
- Dedicated partner page on orion.com

## Orion Advisor Academy

- Featured provider of 1 CE course each year
- 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

## Data Package

- OPS & Brinker proposals including the advisor's name, email, phone, city, state, and zip. Other details shared are BD name, proposal amount, % allocation, and model name.
- Access to the Monthly "What's Hot" webinar data with valuable data flow analysis
- Webinar data includes flows percentages and top 10 models ranked by 3mo, YTD, and 1 year. Data is categorized by benchmark, mandate, firm size, model type, and asset class.
- Reports available in your portal.

## Partner Support

- Quarterly 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 present at one of either the Wealth Management or Technology weekly sales meetings

# 2025 Data Package

\$25,000

Annually

## Data Package

- OPS & Brinker proposals including the advisor's name, email, phone, city, state, and zip. Other details shared are BD name, proposal amount, % allocation, and model name.
- Access to the Monthly “What’s Hot” webinar data with valuable data flow analysis
- Webinar data includes flows percentages and top 10 models ranked by 3mo, YTD, and 1 year. Data is categorized by benchmark, mandate, firm size, model type, and asset class.
- Reports available in your portal.

# 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 (1 Available)

- 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 (1 Available)

- 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 (1 Available)

- 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.