



# Ascent 2025

Sponsorship Prospectus

---

**Powering Advisors.  
Winning for Investors.**

Sponsorship Opportunities: [sponsorship@orion.com](mailto:sponsorship@orion.com)

# 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): Conference lanyards, Conference WiFi, Barista Bar, Welcome Bags
- 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

### 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.

## Redtail University & Align University

- Two lunch hosting & presentation opportunities at either Redtail University or Align University at the city of your choice (first-come, first-serve)
- Premier logo placement in select conference print, electronic and on-site branding
- Pre-event and post-event conference opt-in attendee list, including email addresses

## 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

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

ASCENT 2025

# Sponsorship Packages

Sign a Supernova or Solar sponsorship contract by June 30<sup>th</sup>, 2024 and save \$5,000.

Email [sponsorships@orion.com](mailto:sponsorships@orion.com) if you have questions or would like to commit!

## 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  
0647-OAS-ASC-3/14/2024