

3-4 MAY 2023 | IN-PERSON & HYBRID CONFERENCE

**ENGAGING THE
HNW/UHNW CLIENTS
YOU WANT:
WEALTH 3.0* IN ACTION**

**The new Paradigm by Jim Grubman, Dennis Jaffe, Kristin Keffeler*

SPONSORSHIP OPPORTUNITIES

WHO WE ARE



The premier training resource for professionals who desire to become their clients' trusted professional.

The world leader in Heritage Process research, development, and delivery.

A community of like-minded professionals who generously share their skills and experience with one another.



WHAT WE DO

We believe that to be your client's first call, you must first be their trusted professional. We train professionals on how to enhance their client relationships, shifting from a professional to the professional. The professional is a professional who knows their client's core values and asks the right questions to unleash the motivation and desire that will define the client's next steps. The Heritage Institute Community includes thought leaders, pioneers, and professionals who do so much more than just advise.

We provide training, coaching, and mentoring to professionals and non-profit professionals at three levels: Associate, Specialist, and Master. It includes enrolling new clients and professionals, building deeper relationships, and building and facilitating collaborative teams of professionals to serve clients.

We are the acknowledged leader in multi-generational planning, which is sometimes called inter-generational planning or family succession planning.

CONFERENCE SYNOPSIS

If you pride yourself as an early adopter, you have to join us for **The Heritage Institute's 20th Anniversary Conference in May 2023 – Engaging THE HNW/UHNW Clients/Donors YOU WANT: WEALTH 3.0 IN ACTION**

The Heritage Institute brings innovation to the industry by empowering and training professionals to reach their clients/donors, reevaluate their approach, flip tradition upside down when needed, and shake up what needs shaking. **We are Wealth 3.0 in action and have been training trusted professionals since 2003.**

The Heritage Institute is more than a Thought Leader, we are "Do-Leaders," sending you back to work DOING, changing, impacting, and succeeding at every turn. It's time you DO it with us!

Want more information on Wealth 3.0? Check out Rod's podcast with Jim Grubman: [**"Tipping Point? Embracing the New Era of Rigor and Positivity in Our Work as a Field"**](#). Rod talks with Jim about the ongoing migration to Wealth 3.0 and enhanced research.



CONFERENCE OVERVIEW

DATES

Wednesday, May 3rd – Thursday, May 4th, 2023

VENUE

Dallas/Plano Marriott at Legacy Town Center
In-person & Hybrid Conference

KEY DATES

Deadline for Sponsorships: March 17, 2023



2023 SPONSORSHIP OPPORTUNITIES

PLATINUM \$12,500

- 1 available
- Listing as Platinum Sponsor with name, logo, and company website link listed on conference website and promotional materials
- Listing as Sponsor for hybrid/virtual services
- Option to provide materials we distribute to attendees
- Sponsor table during in-person conference
- Zoom Expo virtual booth during conference
- List of conference attendees for unlimited use
- Two (2) complimentary in-person or virtual registrations
- Option to upgrade to being a THI Strategic Relationship for 2023 for an additional investment of \$500 (\$3,000 value)

GOLD \$7,500

- 3 Available
- Listing as Gold Sponsor with name, logo, and company website link listed on conference website and promotional materials
- Designated as the sponsor of a meal or reception during the conference
- Option to provide materials we distribute to attendees
- Sponsor table during in-person conference
- Zoom Expo virtual booth during conference
- Three (3) post event emails will be sent to attendees on their behalf
- One (1) complimentary in-person or virtual registration
- Option to upgrade to being a THI Strategic Relationship for 2023 for an additional investment of \$500 (\$3,000 value)

SILVER \$2,500

- Listing as Silver Sponsor with name and logo listed on website and promotional materials
- Option to provide materials we distribute to attendees
- One (1) post-event email will be sent to attendees on their behalf
- One (1) complimentary virtual registration
- Option to upgrade to being a THI Strategic Relationship for 2023 for an additional investment of \$1,000 (\$3,000 value)

CONTACT

SPONSORSHIP, REGISTRATION & GENERAL INQUIRIES

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The
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We train trusted professionals