

Overview

ECHELON Partners will be hosting a **Deals & Dealmakers Webcast Series** throughout September and November of 2020. Each individual webcast will focus on one specific topic within the “M&A Ecosystem,” allowing ECHELON and its partner firms to create targeted, relevant discussions within our community. **Topics that ECHELON will explore during the Deals & Dealmakers Webcast Series include, but are not limited to:**

- 1 The Changing Dynamics of M&A in the RIA Industry
- 2 How to Maximize the Value of Your Firm – Before and After a Deal
- 3 Build or Buy – Or Both? Balancing Organic and Inorganic Growth Strategies
- 4 The Evolution of Deal Structure and Financing
- 5 Succession Planning – Challenges & Solutions
- 6 Culture & Alignment – The People Side of Dealmaking

Sponsorship Opportunities & Benefits

ECHELON Partners will be looking for industry leading firms to partner with and sponsor the individual webcasts within the Deals & Dealmakers Webcast Series.

Sponsor Benefits: ECHELON will be limiting the number of sponsorship opportunities. DDM webcasts will have no more than one **(1)** Gold Sponsor and two **(2)** Silver Sponsors per webcast.

Deals and Dealmakers Webcast Sponsors have access to the following benefits based on sponsorship levels:

- 1 **Thought Leadership:** Have one (1) company executive featured on the panel and throughout all webcast promotions.
- 2 **Branding:** Acknowledgement as a webcast sponsor in all promotions for the webcast & the broader DDM webcast series.
- 3 **Lead Generation:** Access to contact information provided by webcast registrants and attendees.
- 4 **Distribution:** Ability to offer resources to webcast registrants and attendees in post-webcast follow-up email.
- 5 **Ask the Experts:** ECHELON will also include an “Ask the Experts” feature in the post-webcast email, which allows registrants to indicate if they would like a follow-up with a representative from a Gold Sponsor.
- 6 **Behind the Deal:** One-on-one interview with company executive on “[Behind the Deal](#),” ECHELON’s proprietary podcast.

Webcast Distribution and Promotions

ECHELON Partners will be promoting each Deals & Dealmakers Webcast through its powerful distribution **network of financial advisers and industry influencers**.

1

Two emails to the ECHELON database to promote registration for the dedicated webcast. (Targeted promotions to 102K+ contacts in database)

2

LinkedIn advertising to a targeted group of advisors to promote the sponsored webcast. (Estimated impressions: 10K)

3

Weekly social posts on LinkedIn and Twitter from the primary ECHELON accounts (1K+ followers)

4

Sponsors will also have the ability to **host the audio and video file** on website and social media pages after the event

5

One post-webcast email to registrants including the webcast replay plus ECHELON and sponsor resources

6

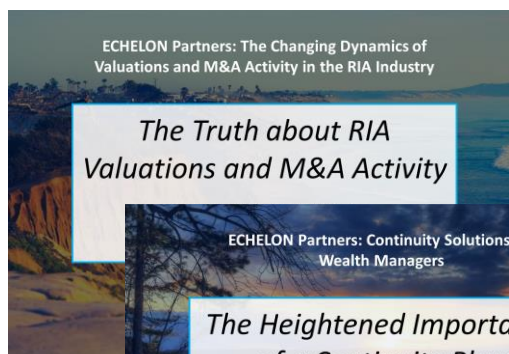
Webcast Replays will be Hosted on ECHELON's Thought Leadership landing page for one year

Sponsorship Packages Overview

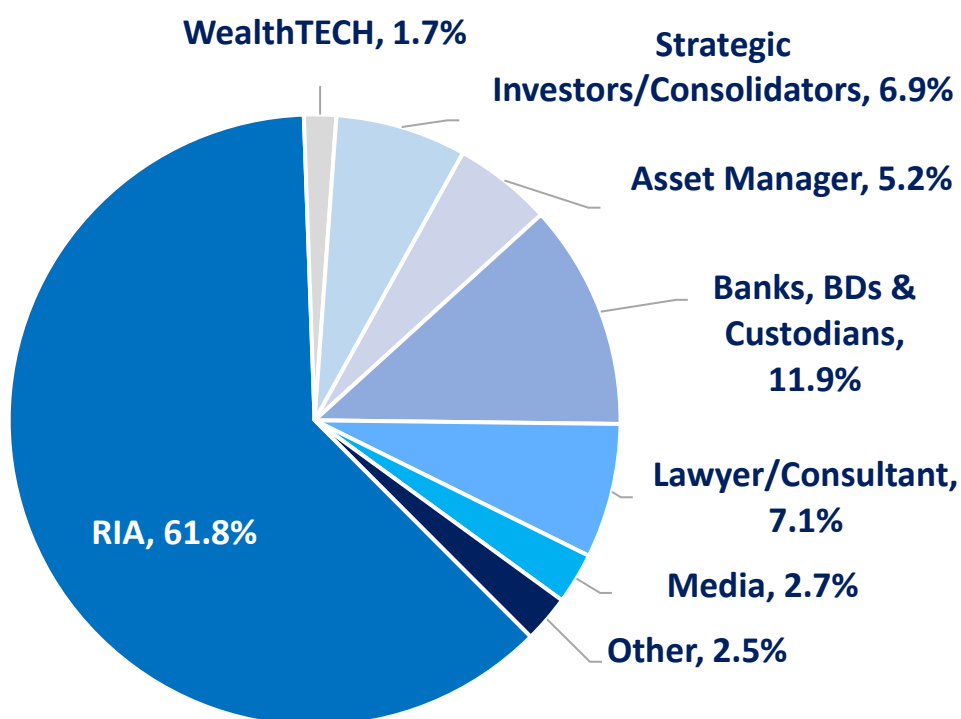
Deals & Dealmakers Webcast Series Sponsorship Packages		
	Gold	Silver
Cost	\$18,000	\$12,000
Pre-Webcast		
Branding on Registration and Promotions	✓	✓
Pre-Webcast Leads	✓	✓
Live Webcast		
Webcast Speaker	✓	✓
Acknowledgement in Opening Remarks	✓	✓
Post-Webcast		
Post-Webcast Leads	✓	✓
One-on-One Behind the Deal Interview	✓	
Inclusion in "Ask the Experts" Follow-up Email	✓	





Recent Webcasts

- 1 [How to Share Equity, Improve Governance, & Increase the Value of Your RIA](#)
- 2 [The Changing Dynamics of Valuations and M&A Activity in the RIA Industry](#)
- 3 [Continuity Planning Solutions for Wealth Managers](#)



About Our Audience



Attendee Statistics	
	\$2 BN Average RIA AUM
	\$454 MM Median RIA AUM
	58.5 Min. Avg. Session Duration
	352 Separate Companies

ECHELON's webcasts attract a diverse group of financial professionals, representing RIAs, Asset Managers, WealthTECH firms, and others from across the country and internationally. All attend, eager to hear ECHELON's experts present on **the most relevant topics facing the industry today**.

For additional information, please contact Mark Bruno at mbruno@echelon-partners.com.