

charles
SCHWAB

2023 Sponsorship Opportunities

ADANTAGE®

EXPLORE®

National Retirement Summit

Brett Shaver
Princeton Global Asset Management
Independent since 2016



Contents

- Advisor Services Events*
 - ADVANTAGE[®]2023
 - EXPLORE[®]2023
 - Sponsorship Fees & Benefits
- Retirement Business Services Event*
 - National Retirement Summit
 - Sponsorship Fees & Benefits
- Indicate Your Interest

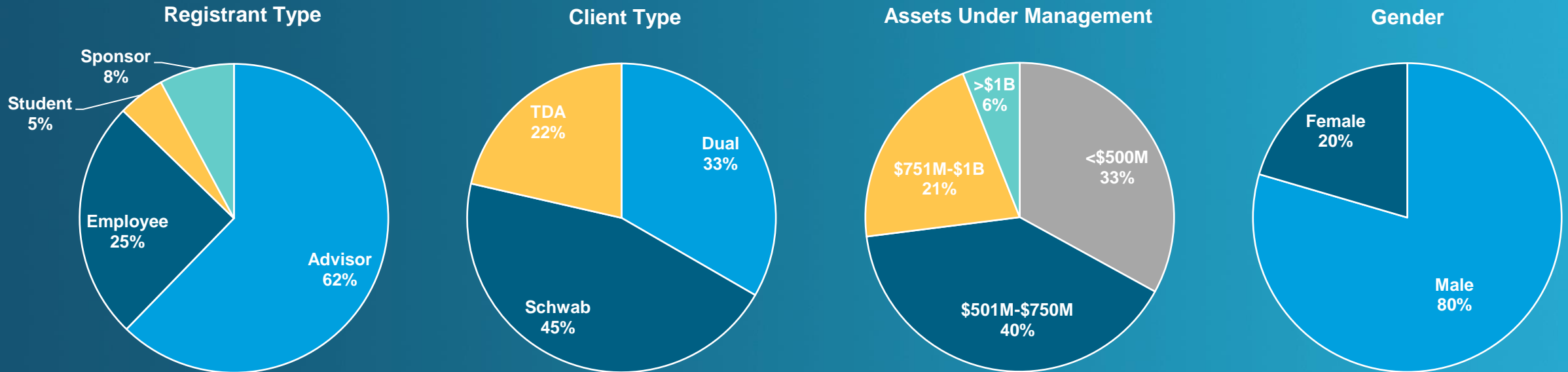
*Categories and benefits are subject to Schwab approval and subject to change and/or availability

ADVANTAGE[®]2023

ADVANTAGE is a national event designed to host between 85-125 RIAs, across multiple territories whose firms manage an estimated AUM between \$330M-\$999M. It's a three-day event in Scottsdale, Arizona that is focused on growth-minded firms. Sessions will focus on growth opportunities as well as providing tactical and strategic insights to help them achieve their goals. Past sessions have focused on leadership, cybersecurity, mergers and acquisitions, regulatory environment, and future clients.

Attendee Demographics

Attendance data as of 3/25/2022

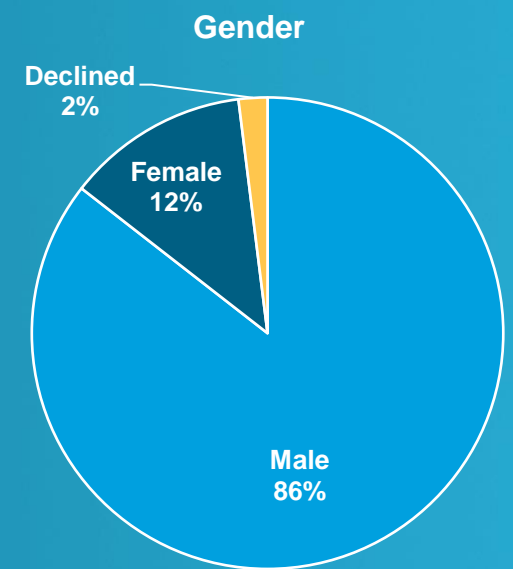
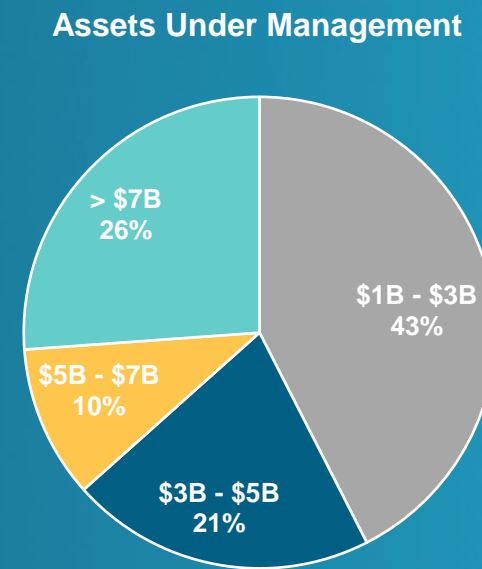
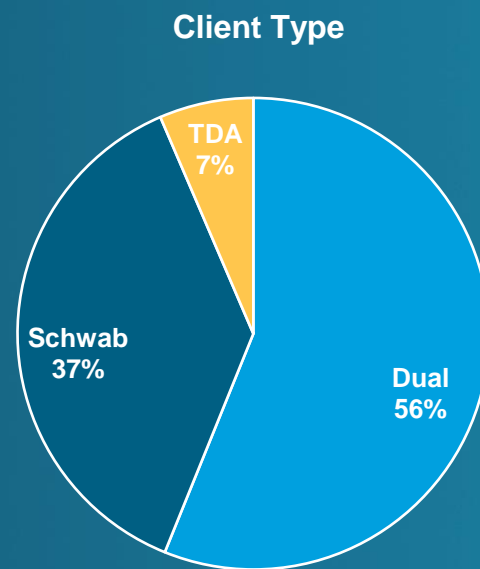
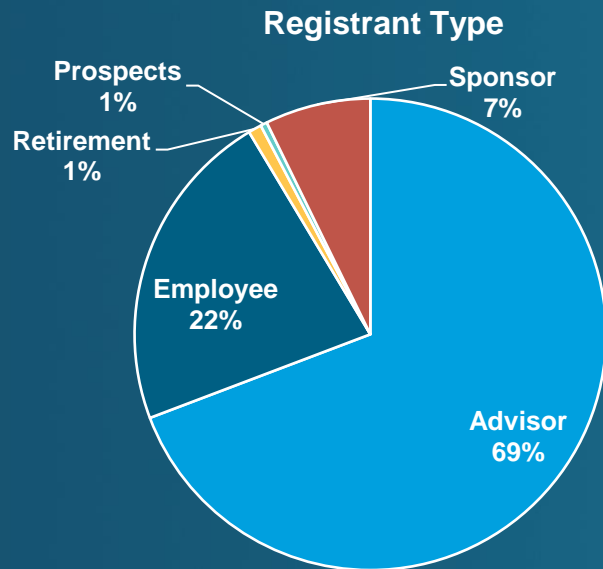


EXPLORE[®]2023

EXPLORE is an annual summit where ideas and practical wisdom converge, where RIAs have the opportunity to think on a personal and a strategic level about how to best guide their firms. EXPLORE is exclusively for Schwab's most valued firm leaders whose firms manage \$1B+ in AUM. This three-day national event provides RIAs with the environment to exchange experiences and expertise with peers, gain the perspective of innovative thinkers, and interact with Schwab executives in an intimate setting.

Attendee Demographics

Attendance data as of 7/1/2022



Sponsorship Fees & Benefits

ADVANTAGE@2023

March 7-9, 2023
Scottsdale, AZ

Sponsorship Fee: \$45,000

Benefits Include:

- 2 -3 minutes of non-product specific sponsor remarks during the general session
- Up to four representatives in attendance
- 50-word company description on conference website
- Logo placement in conference print, electronic, and on-site materials
- One-time use of pre-event and post-event conference opt-in attendee list
- Opportunity to distribute approved, educational marketing collateral
- Opportunity to distribute branded promotional items

EXPLORE@2023

June 14-16, 2023
Orlando, FL

Sponsorship Fee: \$75,000

Benefits Include:

- 2 -3 minutes of non-product specific sponsor remarks during the general session
- Up to four representatives in attendance
- 50-word company description on conference website
- Logo placement in conference print, electronic, and on-site materials
- One-time use of pre-event and post-event conference opt-in attendee list
- Opportunity to distribute approved, educational marketing collateral
- Opportunity to distribute branded promotional items

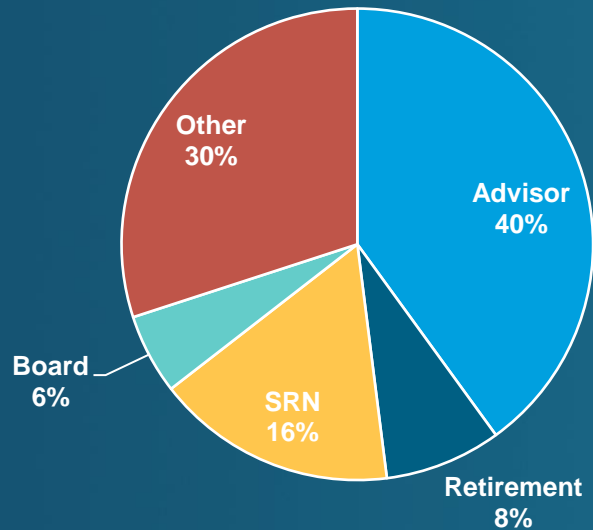
National Retirement Summit

The National Retirement Summit is a national conference held for independent recordkeepers and retirement advisors to meet and network with industry experts, peers, and Schwab senior management. This two-and-a-half day event is held for 135 attendees and provides an opportunity for them to learn from Schwab and nationally recognized subject-matter-expert speakers about practice management, operational management, and retirement topics in general sessions and breakout sessions.

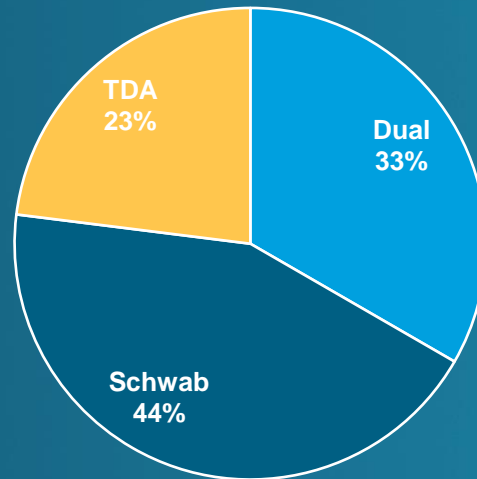
Attendee Demographics

Attendance data as of 4/29/2022

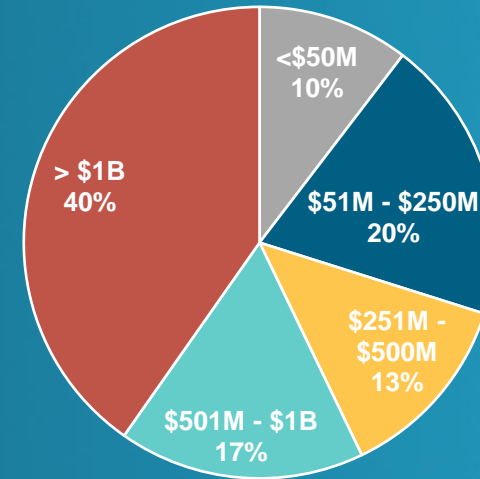
Registrant Type



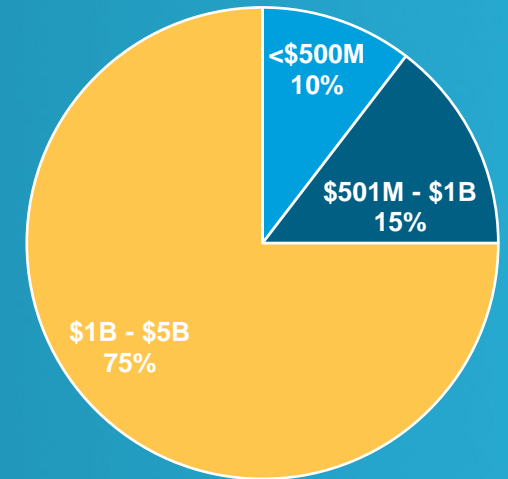
Client Type



Advisor Assets Under Management



Retirement Plan Assets Under Management



Sponsorship Fees & Benefits

April 11 – 13, 2023, San Diego, CA

Education Session Sponsor

Sponsorship Fee: \$18,500

Benefits Include:

- Opportunity to nominate a speaker for a 45-60 minute general education session*
- Up to two representatives in attendance
- 50-word company description on conference website
- Logo placement in conference print, electronic, and on-site materials
- One-time use of pre-event and post-event conference opt-in attendee list
- Opportunity to distribute approved, educational marketing collateral
- Opportunity to distribute branded promotional items

Breakout Session Sponsor

Sponsorship Fee: \$14,500

Benefits Include:

- Opportunity to nominate a speaker for a 45-60 minute breakout session*
- Up to two representatives in attendance
- 50-word company description on conference website
- Logo placement in conference print, electronic, and on-site materials
- One-time use of pre-event and post-event conference opt-in attendee list
- Opportunity to distribute approved, educational marketing collateral
- Opportunity to distribute branded promotional items

Reception Sponsor

Sponsorship Fee: \$12,500

Benefits Include:

- 2-3 minutes of non-product specific sponsor remarks
- Up to two representatives in attendance
- 50-word company description on conference website
- Logo placement in conference print, electronic, and on-site materials
- One-time use of pre-event and post-event conference opt-in attendee list
- Opportunity to distribute approved, educational marketing collateral
- Opportunity to distribute branded promotional items

Lunch Sponsor

Sponsorship Fee: \$12,500

Benefits Include:

- 2-3 minutes of non-product specific sponsor remarks
- Up to two representatives in attendance
- 50-word company description on conference website
- Logo placement in conference print, electronic, and on-site materials
- One-time use of pre-event and post-event conference opt-in attendee list
- Opportunity to distribute approved, educational marketing collateral
- Opportunity to distribute branded promotional items

Indicate Your Interest

Interested in sponsoring?

- Let us know what event(s) you're interested in sponsoring by replying to the email you received OR
- Send an email to SchwabEventSponsorships@schwab.com
- Let us know by **December 16, 2022**
- We'll let you know in early January 2023, if you've been selected as a sponsor

Have questions?

- Send an email to SchwabEventSponsorships@schwab.com