



**3PM**

THIRD PARTY MARKETERS ASSOCIATION

# **Partner Opportunities**

*Sponsorships, Advertising, Partnerships*

For Sponsors, Vendors and Associations

July 2011 – June 2012



**3PM**

THIRD PARTY MARKETERS ASSOCIATION

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# 3PM

THIRD PARTY MARKETERS ASSOCIATION

## Partnership Opportunities

The Third Party Marketers Association (3PM) is offering industry service providers an opportunity to partner with the Association and increase their direct exposure to our members, giving them the potential to grow their own client base. 3PM's goal is to provide a diverse array of opportunities to meet the needs of service providers of all sizes and budgets.

3PM was formed in 1998 to maintain a standard of excellence in the industry and share information and ideas among members of independent sales and marketing firms. 3PM also serves to guide investment managers in understanding the role of third party marketers as partners in raising assets under management and in identifying companies with which to work.

3PM currently stands at over 50 members and is growing monthly — both domestically and abroad. 3PM is the only association in the world comprised solely of third party marketers.

Most 3PM member firms consist of two to five highly experienced investment management marketing executives with, on average, more than ten years experience of selling success in institutional and/or retail distribution channels. The Association's members work with both traditional separate account managers as well as with fund products such as mutual funds, hedge funds, private equity and real estate. Firms offering fund products either own their own broker/dealer firm or are sponsored by another broker/dealer. Depending on its size, a member firm may represent between two to ten investment managers. 3PMs also have influence on the managers they work with and provide them with referrals to service providers in the areas of compliance, performance verification, systems and other tools used to assist the manager in raising assets.

3PM member firms have a long history of utilizing outside resources, vendors and service providers to supplement their sales and marketing efforts. Member firms are regular attendees at industry conferences, purchase a variety of databases and industry tools, subscribe to industry periodicals and newsletters, work with external consultants in the areas of compliance and industry regulation and frequently contribute articles, columns and sound bytes to leading publications.



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THIRD PARTY MARKETERS ASSOCIATION

## Sponsorships

### 1. Third Party Provider (3PP)

**Cost: \$3,500 per year**

At the request of many industry vendors and service providers, 3PM developed this popular partnership — the Third Party Provider (3PP). Third Party Provider status is open ONLY to those firms who are regularly engaged in, or devote a significant portion of firm time to, business activities directly relating to or involving the provision of goods and educational information and services to further enhance and promote the role of third party marketers and the managers with which they work. 3PP terms run for a period of one year, from July 1 – June 30.

Being a 3PP allows an opportunity to connect with 3PM members in a variety of ways. Benefits include:

- Introduction of the provider's services to 3PM membership through an Association recommendation
- Website listing with logo, company description and hyperlink to your website
- Right of first refusal and a 20% discount on all 3PM Sponsorship opportunities
- A 20% discount on all 3PM Advertising opportunities
- Additional complimentary attendee with 3PM Conference sponsorship
- Networking opportunities with key decision makers/prospective clients
- 3PM Membership List

### 2. 3PM News Sponsorship

**Cost: \$700 per edition or \$2,100 per year**

3PM's electronic newsletter is published quarterly and is sent to all Association members. Benefits include:

- Banner in *3PM News* announcing the sponsorship including your company logo, website link, company description and contact information
- Article / Interview opportunities in one issue of *3PM News*
- 3PM Membership List



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## Sponsorships (continued)

### 3. Webcast Sponsorship

**Cost: \$1,000 per webcast**

Several per year, 3PM produces a webcast on a variety of relevant topics applicable to our industry. In the past, the Association has held webcasts on Contracts, Financial & Operational Issues for Broker/Broker Dealers, State Registrations and the 3PM/Broker Dealer Relationship. Webcasts are one hour in length, and allow the speaker to interact directly with 3PM members. Benefits include:

- Speaking opportunity directly to members
- Sponsor's name, logo and company description included on all promotional materials
- Website listing with logo, company description and hyperlink to your website
- Sponsors will receive a copy of the recorded session which they can share with their clients

### 4. 3PM Conference Sponsorship

Sponsor and Exhibitor opportunities are available at 3PM's annual Conference.

The annual Conference is a chance for 3PM members to meet in person and discuss a variety of industry issues and opportunities. With U.S. members spread across the country and our international membership growing, 3PM's annual Conference offers a great opportunity for Sponsors to promote their company directly to our members. 3PM offers a variety of ways for Sponsors to participate and has tailored a number of options to appeal to companies of all sizes. Conference sponsorship opportunities are awarded on a first-come, first-served basis.

To request a detailed Conference Sponsorship Kit, or if you are interested in learning more about Conference Sponsorship opportunities, please contact Cynthia Prisco, Executive Director, at 609-799-4900 or by email at [info@3pm.org](mailto:info@3pm.org).



# 3PM

THIRD PARTY MARKETERS ASSOCIATION

## Advertising Opportunities

### 1. *3PM News* Advertising

3PM's electronic newsletter is published quarterly and is sent to all Association members. All ads appearing in *3PM News* will contain a hyperlink to your website.

#### Options:

Frequency	Full Page	Half Page	Quarter Page
1 edition	\$500	\$250	\$125
4 editions	\$1,500	\$750	\$375

For the *3PM News* editorial calendar, or if you are interested in advertising, please contact Cynthia Prisco, Executive Director, at 609-799-4900 or by email at [info@3pm.org](mailto:info@3pm.org).



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## Other Partnership Opportunities

### 1. Member Benefits Provider

Do you have a product or service you want to introduce to our members? Are you looking to increase your client base? Consider offering our members a discount if they buy your product or use your service. Previous participants in our Member Benefit program include a variety of industry publications, conference sponsors and database providers. Benefits include:

- Introduction of your product or service to 3PM membership through an Association recommendation and email blast
- Website listing with logo and hyperlink
- Detailed product/service listing on 3PM's Members-Only page
- 3PM Membership List

If you are interested in learning more about becoming a 3PM Member Benefits Provider, please contact Cynthia Prisco at [info@3pm.org](mailto:info@3pm.org).

### 2. Media Partner

3PM is interested in partnering with several publications and Conference sponsors who want to increase their exposure to 3PM members and visitors to our website. Media Partners will be listed on the 3PM website under the Media Partners page. Each listing includes the Partner's logo as well as a hyperlink to their website, and a brief description.



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## Other Partnership Opportunities (continued)

### 3. Association Partner

3PM's goal is to partner with a select number of prominent industry associations. It is envisioned a partnership will benefit members of both associations by introducing them to new benefits. Benefits include:

- A member list exchange
- Discounts for members who learned about the referral from one of our Partners
- Ability to leverage resources of multiple organizations to benefit both
- Listing on 3PM website under the Association Partners page

If you are interested in learning more about becoming an Association Partner of 3PM, please contact Cynthia Prisco at [info@3pm.org](mailto:info@3pm.org).

## Package Deals

If you are interested in working with us on several of the opportunities outlined above, 3PM is willing to structure a Package Deal that meets your needs. For information about Package Deals, please contact Cynthia Prisco, Executive Director, at 609-799-4900 or by email at [info@3pm.org](mailto:info@3pm.org).



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## 2011-12 Partnership Agreement

**All partnership opportunities are reserved on a first-come, first-served basis. Don't delay!**

Name \_\_\_\_\_

Company \_\_\_\_\_

*Print company name exactly as it will appear on all Partnership materials.*

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Telephone \_\_\_\_\_ E-mail \_\_\_\_\_

### Tell us which Partner Opportunities you would like:

#### Sponsorships

- Third Party Provider (3PP) \$ 3,500
- 3PM News / per edition \$ 650
- / per year \$ 2,000
- Webcast \$ 1,000

#### Other Partnerships (No Cost)

- Member Benefits Provider
- Media Partner
- Association Partner

#### Advertising

- 3PM News \$ \_\_\_\_\_ (indicate the amount of advertising)

PAYMENT: Must be made by check or credit card. Please make checks payable to: "3PM"  
(checks must be in U.S. funds only and drawn on a U.S. bank)

In the amount of: \$ \_\_\_\_\_ USD

Card Number \_\_\_\_\_ Exp. Date \_\_\_\_\_

Signature \_\_\_\_\_

#### Please return payment with this Agreement Form to:

**3PM, 191 Clarksville Road, Princeton Junction, NJ 08550, or by fax: (609) 799-7032**

ADDITIONAL INFORMATION: For questions or to learn more about sponsorship and advertising opportunities available with 3PM, please contact Cynthia Prisco, Executive Director, at (609) 799-4900.

CANCELLATION & PAYMENT POLICY: This document serves as a contract. All Partnership requests are final. Execution of this Agreement Form signifies assumption of legal responsibility to pay for all Partnerships as stipulated on the Form. Partnership refund requests must be received in writing. Cancellations are subject to a \$150 service charge. Payment must be made in U.S. dollars drawn on a U.S. bank.

Signature: By signing this document, you agree to the guidelines outlined above.

Printed Name: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_