



3PM

THIRD PARTY MARKETERS ASSOCIATION

Partner Opportunities

Sponsorships, Advertising, Partnerships

For Sponsors, Vendors and Associations

July 2014 -
December 2015



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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 45 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.



Sponsorship

1. Platinum Industry Associate (formally 3PP)

Cost: \$3,500 per year

At the request of many industry vendors and service providers, 3PM developed this popular partnership — the Platinum Industry Associate (formally 3PP). Platinum Industry Associate 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. Platinum Industry Associate terms run for a period of one year, from January 1 – December 31 (for 2014 the terms are July 1, 2014 – December 31, 2015).

Being a Platinum IA 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 and email blast
- Opportunity to be a Guest Columnist in *3PM Community* on a pre-approved topic
- Website listing with logo, company description and hyperlink to your website
- Right of first refusal and a 20% discount on all 3PM Sponsorship opportunities
- Additional complimentary attendee with 3PM Conference Sponsorship
- Networking opportunities with key decision makers/prospective clients
- 3PM Membership List

2. Industry Associate

The Third Party Marketers Association offers Industry Associate participation to firms who offer products or services which support the efforts of third party marketers and their clients. There are 2 Industry Associate Levels.

<p>Gold Industry Associate [Cost: \$1,500] Benefits Include:</p> <ul style="list-style-type: none"> • Introduction of your product or service to 3PM membership through an Association recommendation and email blast • Website listing with logo and hyperlink to your website • Access to Members Only site • Attend webinars and events at Member Pricing • Discounted attendance to 3PM Conference • Networking opportunities with key decision makers/prospective clients • 3PM Membership List • 10% Discount on Sponsorship Opportunities 	<p>Silver Industry Associate [Cost: \$500] Benefits Include:</p> <ul style="list-style-type: none"> • Introduction of your product or service to 3PM membership through an Association recommendation and email blast • Website listing with logo and hyperlink to your website • Access to Members Only site • Attend webinars and events at Member Pricing • Discounted attendance to 3PM Conference • Networking opportunities with key decision makers/prospective clients • 3PM Membership List
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Sponsorships (continued)

3. 3PM@3pm Sponsorship

Cost: \$1,000 per webcast

Several times 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

5. 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 Gabrielle Copperwheat, Executive Director, at 609-799-4900 or by email at info@3pm.org.



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Other Partnership Opportunities

1. Member Benefits Provider

Cost: Free

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 to your website
- Detailed product/service listing on 3PM's Members Only site
- Inclusion in 3PM Member Benefit Package
- 3PM Membership List

2. Media Partner

Cost: Free

3PM is interested in partnering with several publications and Conference Sponsors who want to increase your exposure to 3PM members and visitors to your 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 your website, and a brief description.

3. Association Partner

Cost: Free

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 a Partner of 3PM, please contact Gabrielle Copperwheat at info@3pm.org.



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Package Deals

If you are interested in working with us on several of the opportunities outlined on previous pages, 3PM is willing to structure a Package Deal that meets your needs. For information about Package Deals, please contact Gabrielle Copperwheat, Executive Director, at 609-799-4900 or by email at info@3pm.org.



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THIRD PARTY MARKETERS ASSOCIATION

2015 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

- Platinum Industry Associate (3PP) \$ 3,500
- Gold Industry Associate \$1,500
- Silver Industry Associate \$500
- 3PM@3pm \$ 1,000

Other Partnerships

- Member Benefits Provider
- Media Partner
- Association Partner

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)

Credit card payments are accepted on the 3PM Members Only site. Once completed Agreement is returned an Invoice will be sent.

Please return this Agreement Form to:

3PM

191 Clarksville Road, Princeton Junction, NJ 08550

Fax: (609) 799-7032

Email: info@3pm.org

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

CANCELLATION & PAYMENT POLICY: This document serves as a contract. All Sponsorship/Partnership agreement terms are final. Execution of this Agreement Form signifies assumption of legal responsibility to pay for the full amount of Sponsorship/Partnership as stipulated on this form. Payment must be made in U.S. dollars drawn on a U.S. bank. Sponsorships/Partnerships are non-refundable if cancellation is sought by the Sponsor/Partner.

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

Printed Name: _____

Signature: _____ Date: _____