



3PM

THIRD PARTY MARKETERS ASSOCIATION

Partnership Opportunities

For Sponsors, Vendors and Associations

May 2009



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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 75 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

Membership in 3PM is open ONLY to those firms and individuals that are part of a third party marketing firm or who work for an organization that represents the products of investment managers that are not affiliated with their firm.

At the request of many industry vendors and service providers, 3PM is pleased to introduce a new way to partner with 3PM — as a 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 for 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 15% discount for Conference Sponsorships
- Inclusion on 3PM Service Provider List
- Complimentary 3PM Conference attendance for two employees
- Networking opportunities with key decision makers/prospective clients

2. 3PM News Sponsorship

Cost: \$650 per edition or \$2,000 per year

3PM's electronic newsletter is published quarterly and is sent to all Association members. *3PM News* is also available to visitors who are interested in the Association via our website, where all previous editions are posted on the News page. 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*
- Inclusion on 3PM Service Provider List



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Sponsorships (continued)

3. Webcast Sponsorship

Cost: \$1,000 per webcast

Twice 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 and the 3PM website
- Inclusion on 3PM Service Provider List

4. Conference Sponsorships

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. membership 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. The various levels of participation are outlined below.

If you are interested in learning more about Conference Sponsorship opportunities, please contact Barbara Swanda, Association Manager, at 609-799-4900 or by email at info@3pm.org.



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Advertising Opportunities

1. 3PM News Advertising

3PM's electronic newsletter is published quarterly and is sent to all association members. *3PM News* is also available to visitors interested in the association via the website, where all previous editions are posted on the News page. All ads appearing in *3PM News* will be clickable to a URL you specify.

Options:

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

Editorial Calendar:

Issue *	Material Close	Distribution Date
2Q 2009	May 15, 2009	May 26, 2009
3Q 2009	August 14, 2009	August 24, 2009
4Q 2009	November 6, 2009	November 16, 2009
1Q 2010	February 12, 2010	February 22, 2010

* Please note that dates are approximate and may change. Advertisers will be contacted on a quarterly basis with the actual due dates for materials and for distribution.

If you are interested in advertising in *3PM News*, please contact Barbara Swanda, Association Manager, at 609-799-4900 or by email at info@3pm.org.



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Advertising Opportunities (continued)

2. 3PM Website

Cost: \$750 / banner ad per year

The Association's website, www.3PM.org, is visited daily by managers looking for sales and marketing representation, other 3PMs interested in joining, as well as a variety of industry service providers. What better way to get exposure for your company than to advertise on www.3PM.org. Benefits include:

- A banner ad on www.3PM.org
- Ads include a hyperlink to a URL you specify

Other Partnership Opportunities

1. Member Benefits Program

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
- Inclusion on 3PM Service Provider List

If you are interested in learning more about 3PM's Member Benefits Program, please contact Sandra Powers, Chair of 3PM's Member Benefit Committee, at powers@arkglobalonline.com.

2. Media Partners

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 Category. Each listing includes the Partner's logo as well as a hyperlink to their website.



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Other Partnership Opportunities (continued)

3. Association Partnerships

3PM's goal is to partner with a select number of prominent industry associations. It is envisioned that 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 Association Partners

If you are interested in learning more about becoming a Media Partner or an Association Partner of 3PM, please contact Donna DiMaria, President, at donna.dimaria@tesseractcapital.com.

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 Barbara Swanda, Association Manager, at 609-799-4900 or by email at info@3pm.org.



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2009 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

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

Other Partnerships (No Cost)

- Member Benefits Program
- Media Partners
- Association Partnerships

Advertising

- 3PM News \$varies
- 3PM Website \$ 750

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 Barbara Swanda, Association Manager, 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: _____