

SER

LATINO ADVISOR SUMMIT



SPONSORSHIP PROSPECTUS

2024

WWW.SERSUMMITS.COM

**OCT. 10-11, 2024
HYATT REGENCY
LA JOLLA AT AVENTINE**



About SER



The 2024 SER Latino Advisor Summit will build on the success of our inaugural CHOIR Gold-certified 2023 event. It will bring all the elements that event brought, but this time in sunny California with a more extensive and robust agenda and more time for attendees to connect.

We saw a gap in the industry. There wasn't a space in financial services that was specifically for Latino advisors and financial coaches. So we created one. And on September 26, 2023, in Phoenix, we came together to provide a space where we could SER, or be. A place where we could connect and build community while also learning things of value.

Our event, which takes place over one evening and one full day day, will provide content based on our three pillars: Support, Educate and Recharge. We will offer two tracks, one for leaders/firm owners, and another for students/next-gen professionals.

SER Latino Summit will offer you a chance to authentically connect with our community and to support your Latino stakeholders through sponsorship to attend.

We thank you for allowing us the opportunity to present a genuine and unique opportunity for your brand to [Support, Educate and Recharge](#) Latino financial services professionals.







Our event takes place over one evening, one full day, and an optional morning on the day after the event. Our programming will be in line with our pillars, **Support**, **Educate** and **Recharge**. The agenda is still being built, however, the general structure will be as follows:

Day 1 (Support)

Family Dinner and networking powered by the **Cornerstone Partners** for attendees already in town.

Day 2 (Educate)

This day will tackle various elements of education by telling the history of wealth in the Latino community, financial literacy in our community, mindset, marketing, career paths, financial coaching, and planning. In addition, we will also tackle topics that include the numbers needed to start your own firm, a working session on how to build your brand, compliance, business development, M&A, building a scalable practice, tech demos, business models and pricing structures. We will close the night with our traditional toast to kick off our night of cocktails, drinks and dancing.

Optional Day 3 (Recharge)

For attendees still in town, we will provide a morning full of a family yoga and meditation session.



ACCESSIBLE PARTNERSHIP OPTIONS

FRIENDS OF SER \$3,000

 **Includes:**

- 1 Entry to the event for somebody from your company.
- Logo on website and conference signage.
- Inclusion in press release regarding the event and its sponsors.
- Invitations to virtual Conecciones networking events

SUPPORTERS OF SER \$1,000

 **Includes:**

- Logo on website and conference signage.
- Inclusion in press release regarding the event and its sponsors.

For **increased visibility**, more extensive partnership packages are available! Please see the next pages. You can customize, mix and match options from the Custom Sponsorship options. Elements in those options will come with more signage. All packages come with the elements of the Friends and Supporters category.



CUSTOM SPONSORSHIP



Meals

October 9 Reception: \$15,099
Breakfast \$10,599
Morning Break: \$5,699
Lunch: \$13,399
Afternoon Break: \$5,799
Oct. 10 Reception: \$7,999

Signage at sponsored meal/break with your logo thanking you!



Swag Bags

\$4,050

Logo on swag bags, inclusion of swag from other sponsors



PowerLunch Live Interview Package

4: \$4,299
3: \$3,299
2: \$2,299
1: \$1,299

15-30 minute live interviews pushed out on social



Attendee Packages

25 Attendees: \$10,699
15 Attendees: \$6,399
10 Attendees: \$4,599
5 Attendees: \$2,199



Student Attendee Package

25 Attendees: \$7,475
15 Attendees: \$4,485
10 Attendees: \$2,990
5 Attendees: \$1,495



SER Conexiones Networking Webinar

1: \$2,599 per event



Audio and Visual

\$10,470



DJ

\$1,055



Photographer

\$1,299



Photo Back Drop

\$1,119



Morning Workouts Oct. 9 and 10

\$3,299

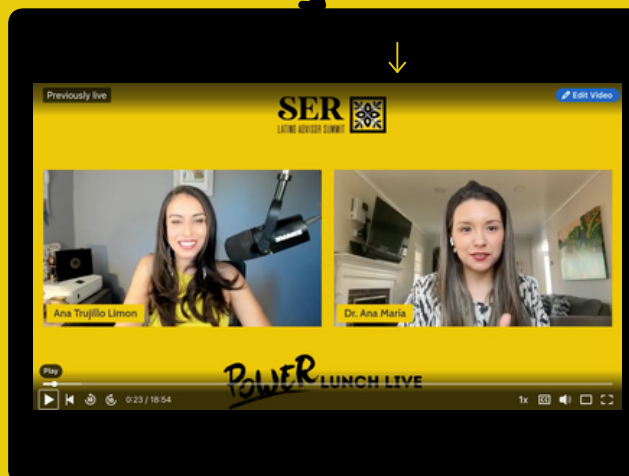
149

Average viewers per event

↑ 336

Highest No. of Viewers

Interview between Craig Lemoine (sponsor) of University of Illinois and Ana Limon



486

Average # of views per event

↑ 1,918

Highest No. of Views

Interview between SER co-founders Anna N'Jie Konte and Vanessa Martinez about the power of community.



Platinum





\$55,000

As a **Platinum** sponsor, you will benefit in several ways, in addition to announcement in press release, thank you on social media, and signage at the event, this sponsorship includes:

- ✔ You will get eight entries to the event, preferably to use for your Latino or underrepresented employees. However, you can send any representative you would like! Attendees will be immersed in the experience. **There's no sitting at a table in an empty exhibit hall with SER Summit**, your representatives will be in the thick of the action, participating and connecting with the attendees. This also provides your company the opportunity to *authentically* connect with our attendees.
- ✔ The Platinum sponsorship gets one 30-minute speaking spot that we hope can align to one of our three pillars: Support, Educate and Recharge!
- ✔ The first Platinum sponsor to sign on can get their pick of powering lunch or dinner. All signage for the meal of choice will read "Meal Powered by [Sponsor]." The second Platinum sponsor to sign on will get the meal that wasn't chosen and will also have signage acknowledging their sponsorship.
- ✔ The Platinum sponsors will get a package of THREE of our popular SER PowerLunch Live interviews that we broadcast on our social media platforms. One interview with the Gold sponsor will take place BEFORE the event, and one will take place after, at the convenience of the Gold sponsor. We will cover whatever topic the Gold sponsor is well-versed in that fall under the Support, Educate and Recharge category.



As a **Gold** sponsor, you will get value before, during and after the event. Here are additional benefits that come with a **Gold** sponsorship in addition to announcement in press release, thank you on social media, and signage at the event:

-  You will get five entries to the event, preferably to use for your Latino or underrepresented employees. However, you can send any representative you would like! Attendees will be immersed in the experience. **There's no sitting at a table in an empty exhibit hall with SER Summit**, your representatives will be in the thick of the action, participating and connecting with the attendees. This also provides your company the opportunity to *authentically* connect with our attendees.
-  The Gold sponsor will power the snack breaks and will be noted as the sponsors of said snacks with signage throughout.
-  The Gold sponsors will get a package of TWO of our popular SER PowerLunch Live interviews that we broadcast on our social media platforms. One interview with the Gold sponsor will take place BEFORE the event, and one will take place after, at the convenience of the Gold sponsor. We will cover whatever topic the Gold sponsor is well-versed in that fall under the Support, Educate and Recharge category.
-  Gold sponsors will power our 2024 CHOIR Certification. We will announce the Gold sponsor every time we get certified. We were only one of two events to ever get the Gold-level certification from CHOIR, which is why we chose the Gold sponsor to power this particular item!



As a **Silver** sponsor, you will get value before, during and after the event. In addition to announcement in press release, thank you on social media, and signage at the event, this sponsorship includes:



You will get three entries to the event, preferably to use for your Latino or underrepresented employees. However, you can send any representative you would like! Attendees will be immersed in the experience. **There's no sitting at a table in an empty exhibit hall with SER Summit**, your representatives will be in the thick of the action, participating and connecting with the attendees. This also provides your company the opportunity to *authentically* connect with our attendees.



The Silver sponsors will get a package of two of our popular SER PowerLunch Live interviews that we broadcast on our social media platforms. One to take place before the event, and another to take place after.



As a **Bronze** sponsor, you value and visibility. In addition to announcement in press release, thank you on social media, and signage at the event, this sponsorship includes:



You will get two entries to the event, preferably to use for your Latino or underrepresented employees. However, you can send any representative you would like! Attendees will be immersed in the experience. **There's no sitting at a table in an empty exhibit hall with SER Summit**, your representatives will be in the thick of the action, participating and connecting with the attendees. This also provides your company the opportunity to *authentically* connect with our attendees.



The Bronze sponsors will get one of our popular SER PowerLunch Live interviews that we broadcast on our social media platforms. We can conduct this interview before or after the event.



Our Team



VANESSA N. MARTINEZ, MBA



GUILLERMO GUTIERREZ JR., CFP®



ANNA N'JIE KONTE, MBA, CFP®



ANA TRUJILLO LIMON, MBA



DIANA G. YÁÑEZ, CFP®



VALERIE RIVERA, CFP®



CINDY MOTA, CFP®



LUIS F. ROSA, CFP®, EA



FREDDY GARCIA, CFP®



ELAINE KING, MBA, CFP®



GLORIA S. GARCIA CISNEROS, CFP®



LOUIS BARAJAS, MBA, CFP®