



### Partner Program Benefits

Participating in the CRM Forum Partner Program will enable you to provide thought leadership to decision makers within the CRM space. The opportunity to directly network with purchasers of CRM and CRM related services will save you hours of navigating through targeted companies for the right contacts. You'll also have the benefit of understanding the strengths and weaknesses of the applications as described by members of the Forum through the minutes of the meetings (note: anonymity is a keystone of the Forum, so the notes do not associate comments with particular individuals). You will find out firsthand what major players are looking for in terms of CRM capabilities and their support products. As part of your participation in the Partner Program twice per year you will also have the opportunity to sponsor two exclusive 60 minute teleconferences on a topics chosen in concert with the members.

*Features of the Partner Program include:*

- Participation at bi-annual CRM Forums
- Host Two Partner Sponsored web ex's each year
- Access to all meeting notes and white papers from the CRM Forum
- Attendee list with contact information
- Invitation to all CRM Forum networking sessions
- Opportunity to denote affiliation and link within the On Course Advisors website
- \*Ability to advertise CRM related job opportunities at your firm & Initiate a Research Survey & White Paper where you can present a set of questions to our members and get an industry wide perspective on your topic. Follow this up with a web-x (teleconference) for further discussion. Additional Fee.\*

### Attendees, Metrics and Frequency

The Forum attracts professionals from both business, operations and technology disciplines within asset, advisory and wealth management who make CRM purchasing decisions. There are currently in excess of forty five asset management and advisory firms participating in the Forum. Typically two individuals from each member firm are present. Expansion of membership has occurred exclusively through recommendations and referral by current CRM Forum Members. Meetings are held semi-annually and are generally on the third Monday and Tuesday of April and September. Locations vary and often will be situated geographically near a member firm.

### Format

The Forum consists of a day and a half of networking sessions and round-table discussions on topics proposed by the members. Additional insights from varied industry experts will be presented in an educational and informational format. Time is allocated to provide the opportunity for members and partners to network.

### Sponsorship Opportunity

Partners within the CRM Forum are invited to participate and provide educational and informational content. Sales pitches are not allowed, however, networking opportunities are encouraged during the informal portion of the program. A sponsorship fee is \$11,150 per year. Expenses associated with attending each CRM Forum will be invoiced at registration and vary according to location.