

IRI.2010



Exhibitor
Prospectus
and
Sponsorship
Opportunities

The Insured
Retirement
Institute's 2010
Annual Meeting
October 24 - 26, 2010
Westin Michigan Avenue



Insured Retirement Institute

The Insured Retirement Institute (IRI) is the marketplace for all things pertaining to annuities, insured retirement strategies, and retirement planning. IRI exists to:

- vigorously promote consumer confidence in the value and viability of insured retirement strategies; and
- bring together the interests of the industry, financial advisors and consumers under one umbrella.

We represent hundreds of organizations, including insurance companies, banks, investment management firms, distribution firms, and industry service providers. We're focused on the community we serve, and we're equally as focused on creating experiences that benefit our industry partners and help them meet their objectives.

IRI's 2010 Annual Conference helps you to raise your brand's profile, generate leads and make sales with decision makers who have significant purchasing power at leading insurers, asset managers, and broker-dealers as well as the financial advisors who use your products and services every day.

All Exhibits and Sponsorships Include:

- Signage and recognition at the conference
- Logo in meeting program
- Logo on IRI website
- One time use of conference attendee list

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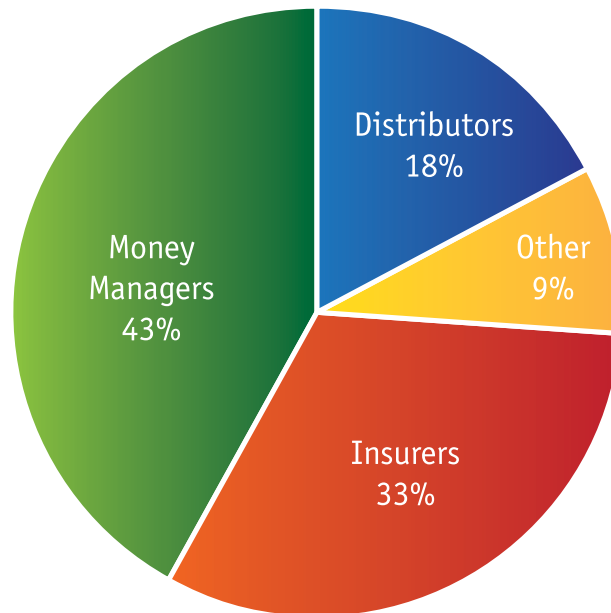
IRI 2010 General Information

Welcome

Do not miss the opportunity to participate in IRI's 2010 Annual Conference, October 24-26, 2010, at the Westin Michigan Avenue. IRI 2010 is IRI's largest conference of senior decision makers in the insured retirement product industry.

Benefits of Exhibiting

IRI 2010 is your opportunity to make contact with decision makers who have the power to positively impact your business. This includes leading insurers, asset managers, and broker-dealers as well as the financial advisors who use your products and services every day. Below is a snapshot graph showing last year's demographic make-up.



By exhibiting at this year's conference, your organization will:

- Reach the leading executives in the retirement insurance industry with significant purchasing power
- Strengthen and build relationships by meeting face-to-face with your target audience
- Launch new products and services
- Determine new and emerging customer needs
- Keep ahead of your competition
- Expand your market penetration
- Establish relationships with dedicated exhibit time and networking events
- Transform qualified leads into business opportunities

In order to achieve this, you will receive:

- More than eight hours of dedicated exhibit time
- An expanded focus on all facets of the retirement insurance industry including financial advisors at the meeting

The sponsorship/exhibitor program was developed to provide our industry partner community with opportunities to align with IRI through marketing platforms. These unique opportunities for our industry partners help build and maintain year-round relationships with our members and the retirement insurance community across the nation. Pick from one of our existing sponsorship opportunities, or contact us to design a customized package to meet your unique needs

"I know when I get intelligence from IRI on what the latest happenings are in Washington that can affect my bottom line I can trust it implicitly."

— James A. Shepherdson,
President of AXA Equitable
and current IRI Chairman.

Meeting Location & Accommodations

Westin Michigan Avenue

909 North Michigan Avenue
Chicago, IL 60611
Phone: 312-943-7200

Group Code: IRI

<http://www.thewestinmichiganavenue.com/>

Fax: 312-397-5580

A block of rooms has been reserved at a discounted rate of \$215 per night (plus tax). To make your reservation online, please go to <http://www.irionline.org/conferences/2010Annual/hotel.html> or call 800-WESTINS (937-8467) and reference "IRI" to receive the group rate. The discounted rate is available until October 10, 2010, or until the room block is sold out.

Exhibit Booth Rates & Information

Exhibit Booth Package includes:

- 10' x 10' booth with 8' draped back rail and 3' draped sides
- 6' draped table
- Two chairs
- Wastebasket
- 7" x 44" company ID sign
- Two (2) full conference registrations
- One (1) complimentary use of the pre-registration attendee list for a mailing to promote participation in the conference or products/services

Exhibit Booth Rates

	Members	Non-Members
10'x10' Booth	\$2,950	\$5,950
<i>(Does not include additional personnel)</i>		

Additional Booth Personnel Dates & Rates

A 10'x10' exhibit booth includes two complimentary registrations to the conference. If you wish to register additional booth personnel for the meeting, you may do so online by visiting www.irionline.org. Click on "Conferences" and select the 2010 Annual Meeting. On the registration page, when prompted, enter the promotion code "BOOTH" to receive the correct pricing. *(Please note that the promotion code is case sensitive.)*

	Members	Non-Members
EARLY <i>(Payment received or postmarked on or before October 1.)</i>	\$750	\$1,050
REGULAR <i>(Payment received or postmarked after October 1 and before October 15.)</i>	\$800	\$1,100
FULL <i>(Payment received after October 15.)</i>	\$850	\$1,150



IRI MEMBER DISCOUNTS/RATES

To qualify for the member rate on exhibits, advertising or sponsorships for the IRI Marketing Conference, companies must be a member, in good standing, for the 2010 fiscal year at the time of the conference.

“I need to spend my time somewhere that gets me access to all aspects of the insured retirement industry and with all the major players — and IRI is that place.”

— Bill Loehning, EVP
Fidelity Investments
and IRI Board member

Specifications

Logo Specifications

All sponsors and advertisers will have their logo appear in the final program and on-site signage. Logos must be submitted in the following format no later than September 24, 2010.

- A 300 DPI .eps or vector art file with PMS numbers supplied
- A 200 x 200 pixels logo in a .jpg or .png art file
- 100-Word or Less Company Description: The 100-word maximum company description will be incorporated into the meeting program; however, descriptions received after September 24, 2010, are not guaranteed placement. Please be sure to include the company's public contact, address, phone and email as they will be in the program with the description. Please e-mail the description to IRI at conferences@irionline.org.

Ad Specifications

In order for IRI to use your ad, the following guidelines must be adhered to:

- Size: trim, 5.875" wide x 8.625" high; live area, 5.375" x 8.125" (no text outside live area, bleeding pictures are acceptable)
- Please include 1/8" bleeds on all 4 sides of document if artwork spans to trim edge
- Programs:
 - Adobe Indesign CS5 or Adobe Illustrator CS5
 - Adobe Photoshop CS5 CMYK ONLY, no spot colors; (in the case that RGB color mode or spot colors are used, color distortion will occur) scanned images must be 300 dpi resolution at reproduction size.
- Copy of ALL parts of file: document file(s), fonts (screen & printer), graphics (include embedded and nested images), and photos/scans.

Electronic Submissions for Ads

In order for IRI to accept an electronic submission of your ad, the following guidelines must be adhered to:

- Any of the program types referenced in the ad specifications above are acceptable (i.e. .qxd, .tiff, .ia, .eps, .indd) in a compressed collected or packaged document folder. Please include a low resolution PDF in your document folder for visual purposes.
- A hi-resolution PDF may be submitted in substitution of a collected/package document folder. PDF must be at least 300 dpi and include 1/8" bleeds in document if applicable.
- Any files over 2 MB in size must be sent through a file sharing site such as YouSendIt.com.

“IRI fully utilizes its members’ expertise in a way that benefits the entire industry.”

— Lynne Ford, CEO, ING U.S. Financial Services and past IRI Board member

“IRI has become the go-to source in the media on all things annuities and insured retirement strategies — and faster than anyone could have dreamt.”

— Mark Casady CEO of LPL Financial and past IRI Chairman

Advertising Opportunities

Advertising Rates for Conference Program

The program serves not only as a guide to the meeting but as a year-round reference of the organizations and people who comprise the insured retirement industry. An ad in the program positions your company as an active supporter of the industry and it is a marketing tool that will pay dividends throughout the year.

	Members	Non-Members
Outside Back Cover.....	\$2,500	\$4,500
Inside Front Cover.....	— SOLD —	— SOLD —
Inside Back Cover	\$2,000	\$4,000
Program Page (<i>placement at IRI’s discretion</i>)	\$1,500	\$3,000
Prelim. Program Page (<i>must purchase ad in final program to qualify</i>) ...	\$500	\$500

Deadline for placement of ads in the preliminary program is receipt of payment and artwork by August 2, 2010. Deadline for placement of ads in the final program is receipt of payment and artwork by September 24, 2010.

Web Banner Ad (NEW this conference)

A banner ad on www.IRIonline.org’s conference site will get you more targeted traffic to your website and create a favorable and lasting impression on everyone who sees your banner ads.

	Members	Non-Members
NEW: Web Banner Ad.....	\$1,000	\$1,500

Sponsorship Opportunities

Event Sponsorships

Event sponsorship provides a great means of broadening your competitive edge by improving your company’s image, prestige and credibility by supporting events that your target market finds attractive.

	Sponsor Cost
Club Exchange	\$45,000
Keynote Speaker – Including introduction (— SOLD — or Tuesday).....	\$15,000
Lunch on Monday.....	— SOLD —
Reception Monday Evening – Exclusive Sponsorship.....	\$10,000
Continental Breakfast in Exhibit Hall Monday or Tuesday	\$5,000
Coffee Break in the Exhibit Hall (3 available)	\$3,000
Reception on Sunday (5 available).....	\$2,500

Conference Materials

Maximize your exposure at the conference by having your company name and logo in the hands of every attendee. All conference materials (excluding the room drop) will be produced by IRI and include the sponsor’s logo on the item. For room drops, sponsors are responsible for production of promotion and delivery to IRI for distribution at the hotel.

	Sponsor Cost
Hotel Key Cards	\$7,500
Padfolio.....	\$5,000
Badge Lanyards	— SOLD —
Room Drop.....	\$2,000
Pens	— SOLD —

“All of the speakers were excellent and the subject matter was at an appropriately advanced and relevant level.”

— IRI conference attendee

“Breakout sessions were very well done—all three I attended were excellent.”

— IRI conference attendee

Show Hours and Events in Exhibit Hall

SUNDAY, OCTOBER 24

Exhibit Hours	5:00 pm – 7:00 pm
Exhibitor Set-up	1:00 pm – 5:00 pm
First Time Attendee Reception	5:00 pm – 5:30 pm
Welcome Reception	5:30 pm – 7:00 pm

MONDAY, OCTOBER 25

Exhibit Hours	8:00 am – 7:00 pm
Breakfast in the Exhibit Hall.....	8:00 am – 9:00 am
Break in the Exhibit Hall	10:00 am – 10:45 am
Lunch in the Exhibit Hall	12:00 pm – 1:30 pm
Break in the Exhibit Hall	2:30 pm – 3:15 pm
Reception in the Exhibit Hall.....	6:00 pm – 7:00 pm

TUESDAY, OCTOBER 26

Exhibit Hours	8:00 am – 10:30 am
Breakfast in the Exhibit Hall.....	8:00 am – 9:00 am
Coffee Break in the Exhibit Hall.....	10:00 am – 10:30 am
Exhibitor Tear Down	11:00 pm – 5:00 pm

Please note this schedule is subject to change.

Important Dates & Deadlines

September 24, 2010

- Exhibitors must submit a company description (100-word maximum), including the company's contact person, address, phone, fax and email address for the final program.
- Payment and artwork for program ads submitted. See page 6 for specifications.
- Any cancellation received on or prior to this date will be subject to a 15% administrative penalty fee.

October 1, 2010

- Any cancellation received after September 10 but on or prior to October 1 will be subject to a 50% administrative penalty fee.
- No refunds will be given after October 1, 2010.
- Early bird registration deadline for additional booth personnel.

October 10, 2010

- Deadline for room reservations at the Westin Michigan Avenue.

IRI 2010 Annual Meeting Exhibit Agreement

Company Name _____

Pre-Conference Contact _____

Address _____

City _____ State _____ Zip _____

Phone _____ Fax _____

E-mail _____

BOOTH RATES & PLACEMENT PREFERENCE

BOOTH RATES: Please note that space will be assigned on a first-come, first-paid basis with priority given to members in good standing. Exhibitor registration forms will not be processed and space will not be assigned until full payment is received.

10'x10' Standard Booths:..... IRI Member \$2,950..... Non-member \$5,950

Please list your top four booth choices:

1. _____
2. _____
3. _____
4. _____

Please list companies that you do NOT wish to be near:

1. _____
2. _____
3. _____
4. _____

NAME & CONTACT INFORMATION FOR THE 2 COMPLIMENTARY REGISTRATIONS

1. Name _____
Title _____
Company _____
Address _____
City, State, Zip _____
Phone _____
E-mail _____
Name you want to appear on badge _____

2. Name _____
Title _____
Company _____
Address _____
City, State, Zip _____
Phone _____
E-mail _____
Name you want to appear on badge _____

Two complimentary registrations are included with your booth space. Additional booth personnel beyond the two complimentary registrations must register at regular attendee prices. Please see page 3 of the Exhibitor Prospectus and Sponsorship Opportunities brochure for instructions on registering additional booth personnel.

PAYMENT INFORMATION:

Please indicate appropriate method of payment: Check Enclosed* Credit Card

*Checks should be made payable to the Insured Retirement Institute.

TOTAL AMOUNT DUE: \$ _____

Card Number: _____ Exp. Date: / /

Name of Cardholder: _____

Signature: _____

By signing this form, I authorize IRI to charge my credit card for the appropriate registration fees based on my member status. Please return these forms with payment and signed *Exhibitor Rules & Regulations Agreement* to:

IRI
1101 New York Avenue NW, Suite 825
Washington, DC 20005
or fax to (202) 898-5786, Attention: Conferences

Office Use Only
Date Rec'd: / /
Date Payment Rec'd: / /
Booth # Assigned: _____

Exhibitor Rules & Regulations

1. Exhibit space will be assigned on a first-come, first-paid basis with priority given to IRI members in good standing. Exhibitor registration forms will not be processed or assigned space until full payment is received. Cancellation of exhibit space and/or registered booth personnel must be received in writing. NO EXCEPTIONS. Any cancellations received on or before September 10, 2010, will be subject to an administrative fee of 15% for the total exhibit payment. Any cancellations received after September 10, 2010, but on or prior to October 1, 2010, will be subject to an administrative fee of 50%. No refunds will be made for cancellations received after October 1, 2010.
 2. The price of exhibit space for a 10'x10' booth is \$2,950 for members and \$5,950 for nonmembers. These fees include: one 10'x10' booth with 8' draped back rail and 3' draped side rails, one 6' draped table, two chairs, one wastebasket, one 7"x 44" company ID sign, and two (2) full conference registrations. Additional booth personnel may register according to the prices outlined on the registration form. Participants must be a member in good standing for fiscal year 2010, to qualify for the member rate.
 3. Exhibitors are prohibited from sharing, subletting or assigning their booth space or any part thereof to third parties. Only one company name per booth will be printed on the ID sign and in the meeting program.
 4. IRI will contract with a general contractor to handle booth installation and all drayage for the Exhibit Hall. THE HOTEL WILL NOT ACCEPT ANY FREIGHT SHIPPED BY EXHIBITORS DIRECTLY TO ITS FACILITY. An exhibit service manual detailing all products and services offered by the exhibit service contractor will be provided to each exhibitor upon receipt of registration materials and full payment of exhibit fees. Additional products and services must be arranged and paid for by the Exhibitor.
 5. IRI will provide one electronic version (excel format only) of the attendee list to each exhibitor approximately two weeks prior to the conference and no later than October 8, 2010. The attendee list provided and the content thereof is a proprietary product of IRI, and is only to be used for advertising your booth, products, and services prior to this particular conference, through one mailing with the US Postal Service. The file or contents thereof may not, in whole or in part, be reproduced, copied, disseminated, incorporated into a computer database, used as a part of or in connection with any mailing list or e-marketing or telemarketing campaign or otherwise utilized, in any form or manner or by any means without IRI's express written consent.
 6. Please note IRI's long standing policy states that no attendee-organized events may be held during any scheduled conference event, including general and elective sessions, receptions and organized networking activities. With respect to events scheduled during non-conference hours, please notify IRI of your event by email to conferences@irionline.org. Please note that your event may only take place at the conference hotel if you are a registered exhibitor and/or sponsor for the conference and have received written approval from IRI.
 7. Exhibitors may not supply their own food or beverage within their exhibit area for distribution or sale to attendees. Items will be subject to the hotel's prevailing corkage fee, gratuity and tax. All arrangements, pending approval from IRI, for food and beverage, are to be made through the hotel's catering department and billed directly to each exhibitor.
 8. Exhibitors and sponsors interested in doing a "Room Drop" to IRI attendees may secure a sponsorship from IRI. All materials must be submitted to IRI for distribution to the hotel. Hotel will not perform room drops to IRI attendee rooms without IRI approval.
 9. Exhibitors are required to follow the schedule for set up and dismantling of exhibits. Exhibit booths are to be set up at least one hour prior to the opening of the exhibit hall. If exhibit booths are NOT set up one hour prior to the opening of the exhibit hall, the service contractor will be hired to set up the exhibit booth, and the exhibitor will be billed directly. Exhibit booths must fit squarely into the assigned booth space without obstructing the view of booths on either side of the space. If the booth is larger than the assigned space, or obstructs the view of another booth, the exhibitor may be required to adjust the booth, move to a corner or purchase a larger space. Exhibit booths may NOT be taken down until after the last event scheduled in the exhibit hall has adjourned. If exhibitors are not available for tear down, they MUST hire the service contractor to tear the exhibit booth down after the last event scheduled in exhibit hall has adjourned. The exhibitor will be billed directly by the service contractor. All booths must be staffed during exhibit hall hours of operation. Exhibitors are permitted to enter the hall 30 minutes prior to each scheduled event, and are only allowed to remain in the hall for 30 minutes after the event has closed. The doors to the exhibit hall will be closed and locked, for security reasons, during off hours, and entrance will not be permitted, unless escorted by IRI staff. Failure to adhere to these requirements may restrict exhibitor's participation at future IRI conferences. By signing this form you authorize the decorator to set-up, move, or dismantle your company's booth should it be necessary per the rules outlined above.
 10. Exhibitors who wish to offer prizes, sample materials, or sponsor any type of contest must have IRI's prior written approval. Failure to notify IRI of any such activity may result in the prohibition thereof.
 11. Exhibits that include the use of any noise making equipment (musical instruments, videos, etc.) must have IRI's prior written approval for operation. Booth decorations and materials must be flameproof and otherwise compliant with all Hotel and state requirements. Volume may not disturb other exhibitors.
 12. All activities and booth personnel must be confined to the allocated exhibit space.
 13. All individuals working the booth or associated with the company must be registered and wear a badge at all times.
 14. Exhibitors are not to imply IRI's endorsement of their products and/or services, nor use IRI's logo or name without IRI's written consent.
 15. Exhibitors using the services of an independent show decorator/installer must notify exhibits management, in writing, no later than September 10, 2010. The "Notice of Intent to use Exhibitor Appointed Contractor" form included in the exhibitor kit must be submitted to the general contractor and the exhibitor must provide certificates of insurance to IRI in the amount of no less than one million dollars of general liability per occurrence; the certificate also must indicate full coverage for installation and dismantling days. All independent contracts must comply with any applicable union regulations for all freight handling, display installation and dismantling, electrical hookups and audio visual services. The exhibitor will indemnify and hold IRI, the general contractor and the Westin Michigan Avenue (Hotel), its agents representatives, associated entities and parent companies harmless for all liabilities and expenses arising from the use of contractors other than the selected general contractor.
 16. IRI reserves the right to make changes to these rules and regulations, as well as the exhibit hall floor plan, as IRI deems necessary or beneficial for the good of the conference and the attendees. IRI will notify all exhibitors of any changes.
 17. IRI reserves the right to terminate, at any time and at its sole discretion, any exhibit contract for non-payment of fees or failure to comply with any and all of these rules and regulations. Such termination will result in forfeiture of fees already paid. IRI reserves the right to take other actions as deemed necessary.
 18. a) The Exhibitor assumes entire responsibility and hereby agrees to protect, defend, indemnify and save Hotel, its owners and operators, and each of their respective parents, subsidiaries, affiliates, employees, officers, directors, and agents harmless against all claims, losses or damages to persons or property, governmental charges or fines and attorney's fees arising out of or caused by exhibitor's installation, removal, maintenance, occupancy or use of the exhibition premises or a part thereof, excluding any such liability caused by the sole gross negligence of the Hotel and/or its employees and agents.
b) As set forth in these Exhibitor Rules and Regulations, the Exhibitor shall obtain and keep in force during the term of the installation and use of the exhibit premises, policies of Commercial General Liability insuring, in an amount not less than \$1,000,000 and \$50,000 for Fire Legal Liability. The Hotel, its owners and operators, the general contractor and IRI shall be included in such policies as additional named insureds.
 19. The Exhibitor hereby indemnifies and holds IRI and its directors, officers and employees harmless from any loss, liability, costs (including attorney's fees) or damages arising from actual or threatened claims or causes of action resulting from the negligence or intentional misconduct of the exhibitor or its respective officers, directors, employees, agents, or contractors.
 20. This agreement is between the organization listed below and IRI, or successor organizations operating under the name IRI or any future name of IRI, Inc.
- I agree to and understand the Exhibitor Rules & Regulations. I also understand that all charges for guestrooms, or other expenses incurred by us, will be payable by us directly to the Hotel, as appropriate.

Contact Signature _____

Printed Name _____

Title _____ Date / /

IRI 2010 Annual Meeting Sponsor Agreement

Company Name _____

Pre-Conference Contact _____

Address _____

City _____ State _____ Zip _____

Phone _____ Fax _____

E-mail _____

ADVERTISING OPPORTUNITIES

	Member	Non-Member
Outside Back Cover (<i>Final program only</i>)	<input type="checkbox"/> \$2,500	<input type="checkbox"/> \$4,500
Inside Front Cover	<input type="checkbox"/> SOLD \$2,500	<input type="checkbox"/> \$4,500
Inside Back Cover	<input type="checkbox"/> \$2,000	<input type="checkbox"/> \$4,000
Program Page (<i>placement at IRI's discretion</i>)	<input type="checkbox"/> \$1,500	<input type="checkbox"/> \$3,000
NEW: Web Banner Ad.....	<input type="checkbox"/> \$1,000	<input type="checkbox"/> \$1,500
Additional Prelim. Program Ad (<i>must purchase ad in final program to qualify</i>)	<input type="checkbox"/> \$500	<input type="checkbox"/> \$500

CONFERENCE MATERIALS

Sponsor Price

Hotel Key Cards	<input type="checkbox"/> \$7,500
Padfolio.....	<input type="checkbox"/> \$5,000
Badge Lanyards	<input type="checkbox"/> SOLD \$4,500
Room Drop.....	<input type="checkbox"/> \$2,000
Pens	<input type="checkbox"/> SOLD \$1,500

EVENT SPONSORSHIPS

Sponsor Price

Reception Sunday (<i>5 available</i>)	<input type="checkbox"/> \$2,500
Reception Monday.....	<input type="checkbox"/> \$10,000
Club Exchange Monday.....	<input type="checkbox"/> SOLD \$45,000
Keynote Speaker Monday.....	<input type="checkbox"/> SOLD \$15,000
Keynote Speaker Tuesday.....	<input type="checkbox"/> SOLD \$15,000
Monday Breakfast.....	<input type="checkbox"/> \$5,000
Monday Morning Break.....	<input type="checkbox"/> \$3,000
Monday Lunch	<input type="checkbox"/> \$10,000
Monday Afternoon Break	<input type="checkbox"/> \$3,000
Tuesday Breakfast	<input type="checkbox"/> \$5,000
Tuesday Morning Break	<input type="checkbox"/> \$3,000

IRI.2010

PAYMENT INFORMATION

Please indicate appropriate method of payment: Check Enclosed* Credit Card

*Checks should be made payable to the Insured Retirement Institute.

TOTAL AMOUNT DUE: \$ _____

Card Number: _____ Exp. Date / /

Name of Cardholder: _____

Signature: _____

No refunds will be given for cancellation of advertising or sponsorships. I understand my credit card will be charged for the items I have selected, according to my membership status. By signing this form, I authorize IRI to charge my credit card for the appropriate fee based on my member status, as set forth above.

Please return these forms with payment and signed Exhibitor Rules & Regulations Agreement to:

IRI
1101 New York Avenue NW, Suite 825
Washington, DC 20005
or fax to (202) 898-5786, Attention: Conferences

Office Use Only

Date Rec'd: / /

Date Payment Rec'd: / /