

ASSET MANAGERS

2025

PARTNERSHIP OPPORTUNITIES

BLUEVAULT

The hub for alternative investments



RESEARCH | EDUCATION | INSIGHTS | INDUSTRY CONNECTIONS

Blue Vault is the hub for wealth advisors to access research, performance data, educational insights and industry connections — and a place for alternative investment asset managers and service providers to connect with wealth advisors.

Founded in 2009, Blue Vault was built on the belief that transparency, education and access are the essential ingredients for wealth advisors to bring alts to the forefront of their practices and select the offerings best suited for their clients.

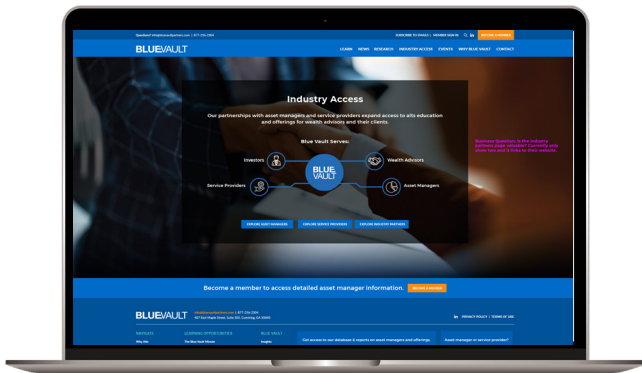
We are committed to providing access to valuable performance information that was once stored only deep inside financial statements and filings, and often difficult to access.

Through Blue Vault, wealth advisors gain access to in-depth research on nontraded REITs, nontraded BDCs, interval funds, tender offer funds, preferred shares and a growing number of private securities offerings by means of reports and a searchable alts offerings database.

We're dedicated to providing news, insights and ongoing learning opportunities to help wealth advisors keep their alts knowledge fresh, stay on top of trends, and to connect wealth advisors with asset managers and service providers.

The Blue Vault Website

A new Blue Vault website launched in the fall of 2023. Our website is a cohesive hub primed for educating Wealth Advisors on alts offerings, promoting Asset Managers and Service Providers, and being the one-stop-shop for all things alternative investments. Everyone who visits our site can view Live Webinars, read current industry news, visit Asset Manager and Service Provider profile pages, and view our calendar of Blue Vault events.



Blue Vault's website also offers Paid Memberships for Wealth Advisors, allowing them to unlock all that the Blue Vault website has to offer.

Members can expect a streamlined, but comprehensive user experience that allows access to in-depth fund performance reports and our interactive research database, current industry news, live *and recorded* webinars and member-exclusive articles.



Events

The Alts Summit

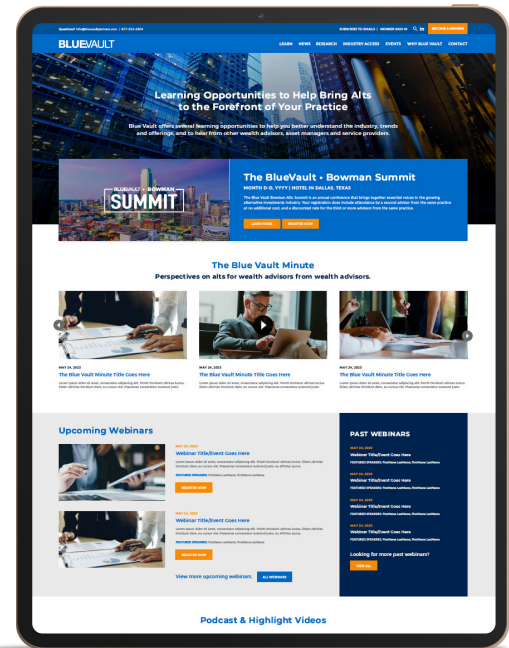
Our signature Alts Summit is held each spring to bring wealth advisors and broker dealers who are using or have expressed interest in alternative investments together with asset managers and service providers. Build brand recognition as a sponsor, exhibitor and speaker, and engage with wealth advisors and broker dealers throughout the conference in sessions, and at meals and networking events.

Alts Day

We also hold a virtual Alts Day each fall to provide wealth advisors and broker dealers with an easy way to get updates on the industry, current offerings and asset managers and service providers. Alts Day is restricted to wealth advisors, broker dealers, and Blue Vault’s Ambassador partners

Education

Whether wealth advisors are new to, or well-versed in, alternative investments, we provide a wide range of learning opportunities, including Alts 101 content, webinars, podcasts, videos and the Blue Vault Minute, a short-form discussion by wealth advisors for wealth advisors on a range of alts topics.



We're dedicated to providing news, insights and ongoing learning opportunities to help wealth advisors keep their alts knowledge fresh, stay on top of trends, and make connections with asset managers and service providers.

Research

Get access to in-depth research on nontraded REITs, nontraded BDCs, interval funds and tender offer funds as well as preferred share offerings. See how your competitors are actually performing with the performance metrics in our alts reports, database and data files. Metrics include capital raise, NAV changes, distribution rates, redemptions, coverage ratios, operating performance and financial outlook. Track individual share classes or the overall performance of the fund.



Three Ways to Access Research

Research Only Subscription \$15,000

(Data pricing subject to change after January 1, 2025)

Alts Reports

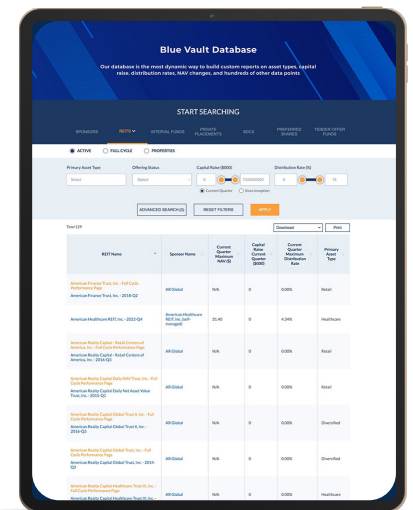
- **Performance Profiles** – Detailed asset manager and offering metrics, including capital raise stats and operational performance
- **Quarterly Highlights** – Synthesizing offering type review report findings into highlights and identifying outliers
- **Nontraded REIT Studies** – Blue Vault is the only data provider with these detailed studies on the key aspects of nontraded REITs – including full-cycle performance, fees and NAVs

Alts Portal

Our database allows for custom searches to compare and analyze alts offerings based on the most recent filings and historical trends, including searches by asset class, anticipated close date, capital raise, distribution rates, payout ratios and NAV changes, among many other data points.

Data Files

Access the underlying data points for every fund Blue Vault covers to do your own analysis of individual funds and asset classes that Blue Vault covers.



BLUEVAULT ALTS SUMMIT 2025

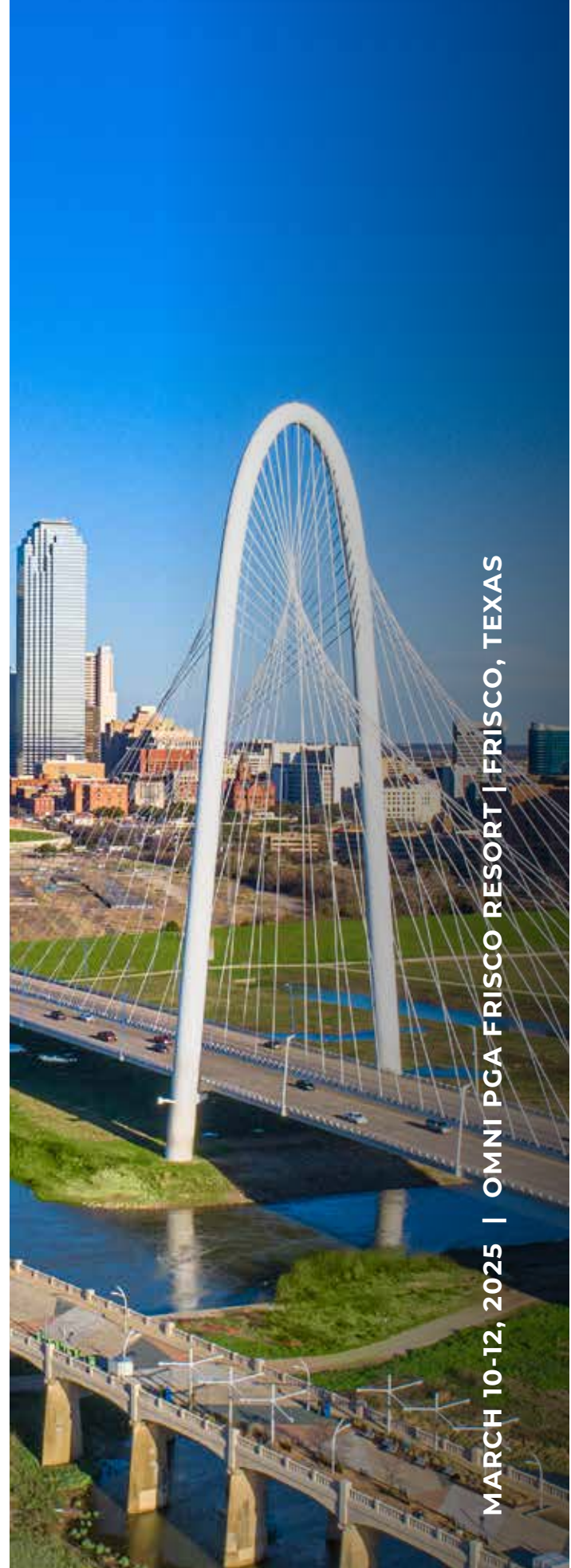
Join Us for Alts Summit 2025

Our signature [Alts Summit](#) is held each spring and brings together more than 200 wealth advisors and broker dealers who are using or have expressed interest in alternative investments to interact with asset managers and service providers. Build brand recognition as a sponsor, exhibitor and speaker, and engage with wealth advisors and broker dealers throughout the conference in sessions, and at meals and networking events.

Highlights

- **Exhibiting** – Exhibit time on all three days of the conference with 80+ booth spaces available ranging from 20' and 10' stand-up booths to 6' tables
- **Presentations** – General sessions, breakouts and discussion rotations
- **Receptions** – On both Monday and Tuesday nights
- **Dinners** – Dine-arounds on Monday and a group dinner at the resort on Tuesday
- **Unique engagement opportunities** – Fire pits, window clings, charging stations, jumbotron messaging, golf tournament and more

Alts Summit Opportunities			
	Presenter \$23,000	Exhibitor \$15,000	Exhibitor \$10,000
Attendance	2 Firm Representatives	2 Firm Representatives	2 Firm Representatives
Breakout Session	15 Minutes		
Exhibit Booth	Tier 4	Tier 5	Tier 6
Sponsorship Level Recognition	✓	✓	✓
Pre-Event Registration List	✓	✓	
Post-Event Attendee List	✓	✓	✓
Blue Vault Website Focus Page	✓		
Pre-Event Email Recognition	✓		



MARCH 10-12, 2025 | OMNI PGA FRISCO RESORT | FRISCO, TEXAS

ADVERTISING

Email and Website Ads

Blue Vault's advertising package includes opportunities to place your firm profile on our website and your ads in on our website and in our emails. All ads can be linked to a landing page of your choice, and will be run on a rotating schedule. Advertising engagement data is also shared upon request. You can also choose to sponsor webinars to educate our audience about your firm and your offerings.

For in depth details, please reference our [Digital Media Kit](#) and reach out to our team with questions.

Our Audience



~13,000

Total audience



3,300

Premium members
(since 2009)



31%

Email open rate



11,986

Unique website
visitors per month



6,516

Essentials members
(email subscribers)



7%

Email click-
through rate



~23,000

Page views per
month



37,640

Partner website ad
impressions



600

Partner news articles
published



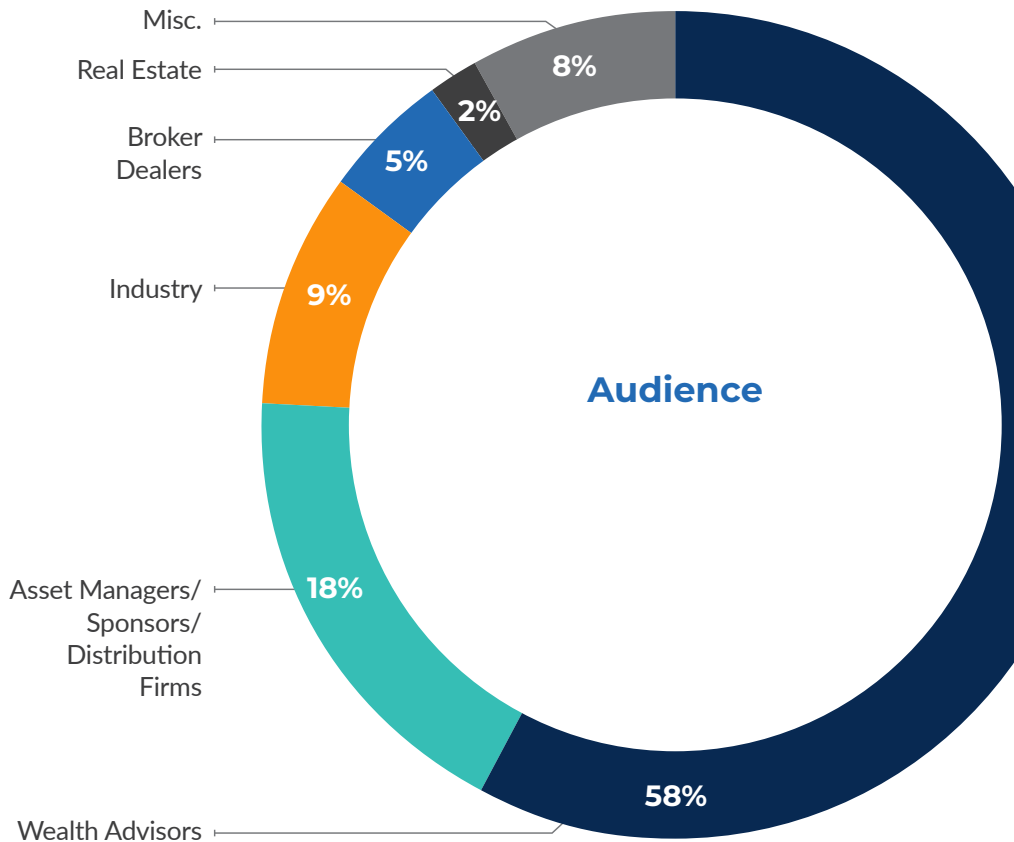
95

Partner thought
leadership
perspectives published



284

Summit registrants



PARTNERSHIPS

Blue Vault Partnerships are all-in-one packages including Research Access, Advertising, Alts Summit attendance and more.

A Blue Vault partnership provides access to an audience of thousands of wealth advisors through our website, emails, webinars, podcasts, social media channels and events. We highlight our partners by sharing news about your firm, your asset class, product structure and offering strategy. We provide touchpoints with advisors to support your own marketing channels. Our partner program is not a “one and done” conference. We help build your brand and engage advisors on your behalf for 12 months.

News & Perspectives

Our website includes news on the industry, asset managers and service providers. We also feature thought leadership perspectives from partner firms directly in our news feed for prominence with wealth advisors as they browse news topics. News and perspectives related to partner asset managers and service providers are featured on their firm profiles.

Emails

We maintain consistent communication with wealth advisors to keep them updated on industry and partner firm news, promote our learning opportunities and provide valuable insight into the industry and investment offerings. Our emails fall into the below categories:

Email	Content Featured	Distribution
Blue Vault Newsletter	Industry news and perspectives, videos, Blue Vault research snippets and insights, upcoming events, and Asset Manager/Service Provider Focus	Weekly
Learning Opportunities	Promotion of webinar, podcast, video and Blue Vault Minute educational content and events	Ad hoc
News Alert	Breaking or important industry news	Ad hoc

Webinars

Our webinars cover a wide range of alts industry topics and highlight partner firms/offerings. We provide registration/attendance reports with email addresses for webinars involving your firm.

Podcasts

Our podcast programming is typically dedicated to a 1:1 conversation with a partner firm to share their perspective on the industry.

Videos

We maximize our webinar and podcast content further by breaking it down into video highlights that are more “snackable” for wealth advisors.

Blue Vault Minute

One topic, one minute. We designed this short-form discussion for wealth advisors by wealth advisors to quickly address a wide range of alts topics.

Blue Vault Insights

We gather a lot of information and review thousands of data points each month. In Blue Vault Insights, we synthesize and boil down what’s going on in the industry to make it easier for wealth advisors to keep tabs.

Inside the Vault

“Did you know” snippets on the alts industry and partner firms to engage even those wealth advisors with the shortest of attention spans.

Firm Profile

Partner firms are featured on our Asset Manager Profiles and Service Provider Profiles pages. Each web page features a company overview, contact information, management team, firm-provided links, sponsored offerings and a call-to-action for wealth advisors and broker dealers to learn more. Premium and All-Access wealth advisors also have access to asset manager products and capital raise information, curated news, webinars, podcasts and videos.

Brand Awareness

We raise your brand awareness by featuring news articles about your firm as well as prominently presenting partner thought leadership perspective articles in our robust news feed and in our emails. Partner firms are also showcased in the Industry Access section of our website.

Lead Generation

We capture wealth advisor and broker dealer interest in asset manager and service provider firms, and in investment offerings and products through webinar registration/attendance, newsletter e-mails and events.

Advertising

We offer advertising opportunities on our website and in our emails for partner firms to stay top of mind with wealth advisors and broker dealers.

PARTNERSHIP OPTIONS

Partnership Benefits	Ambassador (\$70k)	Elite (\$40k)	Signature (\$30k)
Alts Summit Package			
Attendance	5 Firm Representatives	4 Firm Representatives	3 Firm Representatives
Breakout Session	25 minutes	20 minutes	15 minutes
Tuesday Lunch "Hosted Huddles"	✓	✓	
Private Luncheon with BV Wealth Advisor Boards	✓		
Exhibit Booth	Tier 1	Tier 2	Tier 3
Community Groups Meet & Greet	✓	✓	
Window Clings	9 panes	1 pane*	
CE Credit Session Opportunity	✓	✓	✓
Monday Afternoon Snack Break Sponsorship			✓
Group Breakfast Sponsorship		✓	
Opening Reception Sponsorship	✓		
Opening Reception Jumbotron Ad Space	✓		
General Session Recognition	✓	✓	✓
Sponsorship Level Recognition	✓	✓	✓
First Access to Additional Branding Opportunities	✓	✓	
Other Events			
Alts Day 2025	✓		
Sponsor-specific Webinar	2	1	
Panel Appearance on Webinar	2	1	1
Podcast Participation	3	2	1
Research			
Alts Reports	✓	✓	✓
BV Data Portal Access	✓	✓	✓
Complete BV Data Files	✓	✓	
Custom Data/Research Requests	✓		
Marketing (Awareness & Engagement)			
News Articles	✓	✓	✓
Perspectives	✓	✓	✓
Firm Profile Page	✓	✓	✓
Website Advertising	Ad Position 1	Ad Position 2	Ad Position 3
Email Advertising	Ad Position 1	Ad Position 2	Ad Position 3
Lead Generation	✓	✓	✓
Exclusive Partnership Communications	✓	✓	✓
EOY & Mid-Year Outlook Reports	✓	✓	✓
BV Authored Articles	✓	✓	
Sponsor-focused BV Short Video	✓	✓	

*opportunity to purchase upgrade to a 4-pane window

YOUR OBJECTIVES, OUR SOLUTIONS

Blue Vault Solution	Brand Awareness	Driving Traffic	Lead Generation	Engagement	Thought Leadership	Competitive Intelligence & Industry Insights	Wealth Advisor Perspectives
News articles	✓					✓	
Perspectives	✓			✓	✓	✓	
Emails	✓	✓	✓				
Advertising	✓	✓					
Webinars	✓		✓	✓	✓	✓	✓
Podcasts	✓			✓	✓	✓	✓
Videos	✓			✓	✓	✓	✓
Blue Vault Minute	✓				✓	✓	✓
Blue Vault Insights	✓	✓	✓			✓	
Inside the Vault	✓	✓	✓			✓	
Firm Profile	✓	✓	✓			✓	
Alts Reports				✓		✓	
Alts Database				✓		✓	
AltsDay	✓	✓	✓	✓	✓		✓
Alts Summit	✓	✓	✓	✓	✓		✓

INCREASE ENGAGEMENT WITH WEALTH ADVISORS Begin Working with Blue Vault Today

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Tom Coakley

Alts Summit 2025 Sponsorships

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