

ALTA ADVISOR PLATFORM

SPONSORSHIP OPPORTUNITIES




ALTA TRUST

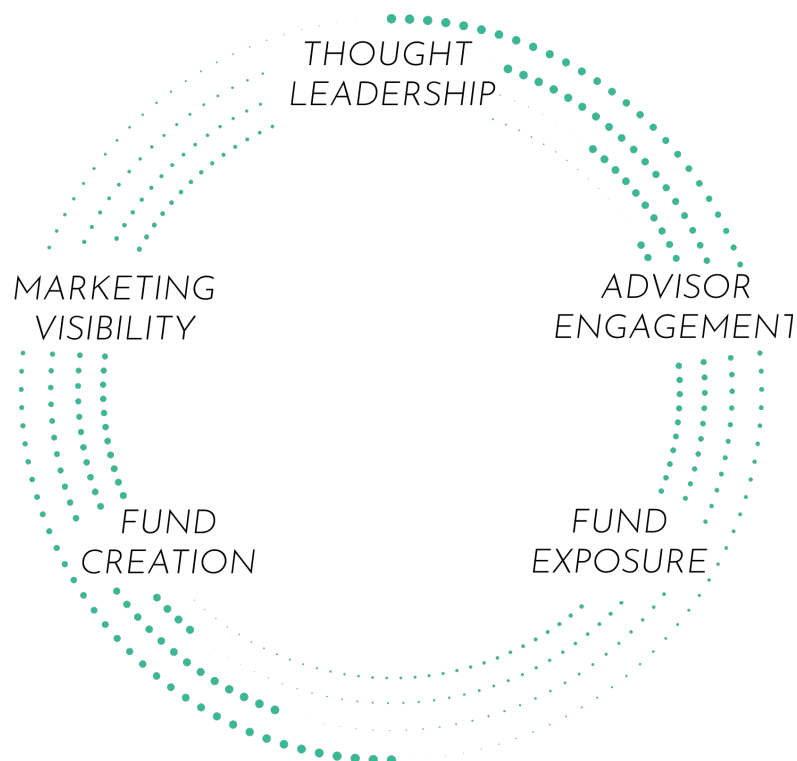
ELEVATE YOUR FUNDS TO THE TOP OF EVERY ADVISORS' LIST

The Alta Advisor Platform helps investment advisors grow, retain, and protect assets through integrated wealth, retirement, and estate planning solutions.

Our sponsorship program enables asset managers to partner with us at the point of advisor decision-making—through education, events, and curated fund select lists.

Advisors gain trusted visibility and access to institutionally priced, pre-screened strategies designed to support long-term asset growth.

This is a strategic partnership, not a marketing placement.



WHAT IS THE ALTA ADVISOR PLATFORM?

ADVISOR PLATFORM FEATURE OVERVIEW

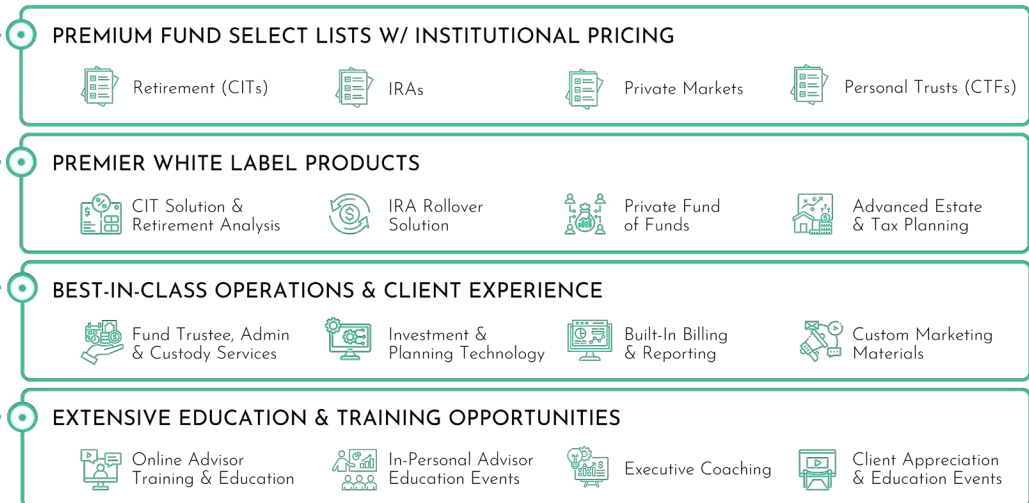


Advisors gain the tools to deepen client relationships across generations and compete more effectively in a rapidly evolving retirement and wealth-management landscape.

By extending advisor capabilities beyond the status quo, the Alta Advisor Platform helps advisors:

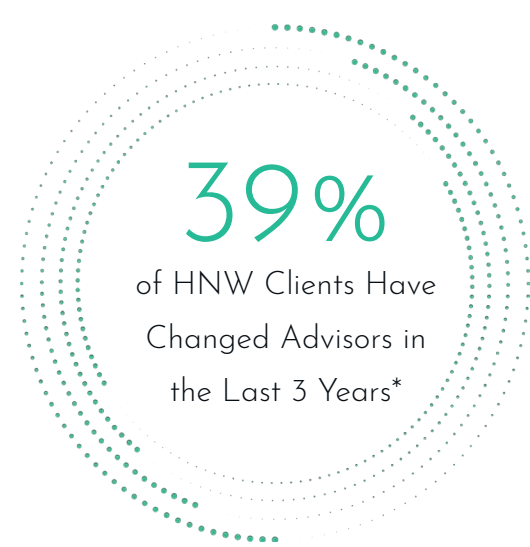
- ✓ Strengthen Client Relationships
- ✓ Retain Assets through Wealth Transfer
- ✓ Position for Long-Term Success

ALTA ADVISOR
PLATFORM MEMBERS



*Fidelity, "14th Fidelity Plan Sponsor Attitude Study 2023."

HOW SPONSORS PARTICIPATE



The Alta Advisor Platform brings sponsors into active partnership with advisors through curated exposure, direct participation, and practical solutions designed to drive long-term adoption.

1. PREMIER FUND SELECT LIST

Feature leading strategies on curated SELECT LISTs that simplify advisor decisions and drive asset placement.

2. FUND CREATION

Creation of Collective Investment Trusts (CITs), Private Funds, and Common Trust Funds (CTFs) at little to no cost.

3. FUND & BRAND EXPOSURE

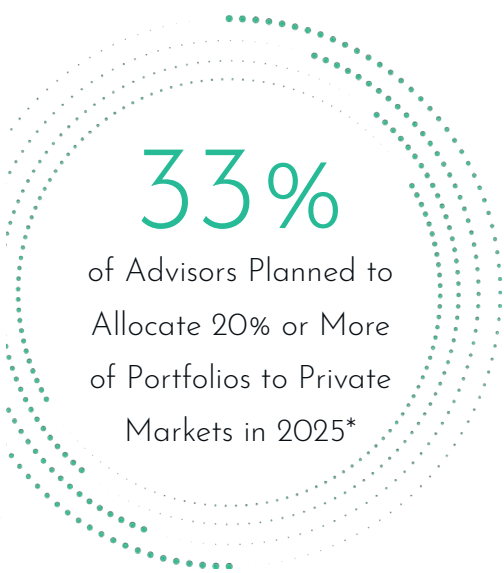
Visibility across educational content, digital resources, webinars, events, and the annual conference.

4. ADVISOR ENGAGEMENT

Direct engagement with advisors through education, insight, and conversation.

**PWC, High-Net-Worth Investor Survey, 2022.*

PREMIER FUND SELECT LISTS



Sponsor funds are featured within the Premier Fund Select Lists providing direct visibility with growth-focused advisors.

Select list strategies will be limited to ensure semi-exclusive placement for sponsors.

PREMIER FUND SELECT LISTS**

<p>Retirement (CITs)</p> <ul style="list-style-type: none"> U.S. Large Cap U.S. Mid Cap U.S. Small Cap International Emerging Market Fixed Income Stable Value Target Date Target Risk Thematic 	<p>IRAs</p> <ul style="list-style-type: none"> U.S. Large Cap U.S. Mid Cap U.S. Small Cap International Emerging Market Fixed Income Stable Value Target Date Target Risk Thematic 	<p>Private Markets</p> <ul style="list-style-type: none"> Private Equity Private Credit Real Estate Infrastructure Commodities Natural Resources Hedge Secondaries Tax Efficient Strategies 	<p>Estate Planning (CTFs)</p> <ul style="list-style-type: none"> Private Equity Private Credit Real Estate Fixed Income International U.S. Equities Hedge Secondaries Tax Efficient Strategies

*Hamilton Lane, "2025 Global Private Wealth Survey."

**Does not represent all strategies. Please inquire about additional.

OUR SPONSOR EXPECTATIONS

Our sponsorship model is built on partnership. We work with asset managers that are committed to engaging advisors thoughtfully, collaboratively, and over the long term.

✓ ADVISOR ENGAGEMENT

We will drive engagement by connecting advisors with sponsors through a referral program and frequent introductions. Meaningful advisor interaction is central to success on the platform.


✓ SELECT LIST ELIGIBILITY

All sponsored strategies must meet defined qualitative and quantitative standards to be considered for inclusion on our curated Select Lists. These lists are intentionally focused and designed to simplify advisor decision-making.

✓ PREFERRED PRICING

Strategies included on the Select List are expected to provide preferred pricing on approved strategies, ensuring competitive outcomes for advisors and their clients.

This is not a passive sponsorship. Sponsors who show up, tell their story clearly, and support advisors consistently are best positioned to drive long-term adoption and asset growth through the platform.



SPONSORSHIP PACKAGES

APEX SPONSORSHIP | \$75,000

ONLY
3
AVAILABLE!



FUND CREATION & PRIORITY PLACEMENT *\$60,000 value*

- Lead positioning on PREMIER FUND SELECT LISTS
- Up to THREE Funds placed on SELECT LISTS (i.e. Mutual Funds, CITs, ETFs)
Funds can include new CITs, created at no setup cost
- THREE Common Trust Funds created at no setup costs



IN-PERSON ADVISOR ENGAGEMENT *\$50,000 value*

- Gold Annual Summit sponsorship with 3 passes + priority speaking opportunities*
- Regional event sponsorship
- Premium promotion and branding



THOUGHT LEADERSHIP & EDUCATION *\$25,000 value*

- Exclusive sponsorship of National RIA Channel Webcast + TWO of the following:
 - » Executive Coaching for RIA Leaders
 - » Estate Planning Webinar
 - » Advisor Member Training
 - » HNW Client Education



MARKETING VISIBILITY *\$5,000 value*

- Featured placement across LinkedIn, emails, and platform website
- Included in select platform press releases, partnership news + fund launch announcements



AND MORE... *\$10,000 value*

- Advisor contact lists from relevant webinars and events
- Preferred pricing for referred advisors
- Detailed reporting

*See page 11 for Alta Trust Annual Summit Gold Sponsor details

ASCENT

SPONSORSHIP | **\$50,000**



FUND CREATION & PLACEMENT *\$40,000 value*

- Prominent positioning on PREMIER FUND SELECT LISTS
- Up to TWO funds placed on SELECT LISTS (i.e. Mutual Funds, CITs, ETFs)
Funds can include new CITs, created at no setup cost
- TWO Common Trust Funds for no setup costs



IN-PERSON ADVISOR ENGAGEMENT *\$30,000 value*

- Silver Annual Summit sponsorship with 2 passes + speaking opportunities and brand placement*
- Regional event sponsorship
- Presenting opportunities + branding



THOUGHT LEADERSHIP & EDUCATION *\$9,500 value*

- Co-sponsorship of one instance of two of the following webinars:
 - » Executive Coaching for RIA Leaders
 - » Estate Planning Webinar
 - » Advisor Member Training
 - » HNW Client Education



MARKETING VISIBILITY *\$3,000 value*

- Placement in select LinkedIn, emails, and platform website
- Included in select platform press releases, partnership news + fund launch announcements



AND MORE... *\$8,000 value*

- Access to applicable advisor contact lists
- Preferred pricing for referred advisors
- Detailed Reporting

*See page 11 for Alta Trust Annual Summit Silver Sponsor details

BUILD-YOUR-OWN SPONSORSHIP | Starting at **\$15,000**



FUND CREATION & PLACEMENT *\$20,000 value*

- ONE FUND placed on SELECT LISTS (i.e. Mutual Fund, CIT, ETF)
Funds can include a new CIT, created at no setup cost
- ONE Common Trust Fund for no setup cost



IN-PERSON ADVISOR ENGAGEMENT *\$2,500 value*

- One pass to the Alta Trust Annual Summit
- Sponsorship acknowledgment at regional events



THOUGHT LEADERSHIP & EDUCATION *\$1,500 value*

- Sponsorship acknowledgment at Alta Trust hosted webinars



MARKETING VISIBILITY *\$1,500 value*

- Inclusion in emails and platform website
- Included in select fund launch announcements



AND MORE... *\$1,000 value*

- Inclusion in sponsor directory available to all platform RIAs
- Preferred pricing for referred advisors

\$15,000
for the first fund
(Includes above benefits)

\$10,000
for subsequent funds*

ALTA TRUST ANNUAL SUMMIT UPGRADES

- \$15,000** Session Presentation
- \$10,000** Keynote Sponsorship
- \$10,000** Booth
- \$7,500** Meal Sponsorship
- \$7,500** Activity Sponsorship
- \$3,500** Panel Participation
- \$2,000** Break Sponsorship
- \$1,000** Additional Registrations

YEAR-ROUND SPEAKING OPPORTUNITIES

- \$5,000** Regional Events
- \$2,500** C-Suite Webinar
- \$2,500** Estate Planning Webinar
- \$2,500** Platform Training Webinar

ALTA TRUST ADVISOR SUMMIT SPONSORSHIP OVERVIEW

The Alta Trust Advisor Summit is Alta’s capstone event for top advisors and RIAs, with all Alta Advisor Platform sponsors included as Summit Sponsors. The Summit features premier speakers and practical strategies to help firms grow, strengthen their teams, and retain clients through the great wealth transfer.

	GOLD \$30,000	SILVER \$20,000	BRONZE \$15,000
Registrations	3	2	1
Event Promotion & Branding	Featured	Standard	Recognition
Speaking Opportunity	General Session	Breakout Session	—
Booth	Yes	Yes	Yes
Contact List	General Attendee	Session List	—
Logo Placement	Priority	Standard	Standard

SPONSORSHIP OVERVIEW

	APEX	ASCENT	BYO
FUND CREATION & PLACEMENT			
Premier Fund Select Lists	3 Funds Featured	2 Funds	1 Fund
Fund Creation	Up to 3 CITs + 3 CTFs	Up to 2 CITs + 2 CTFs	Up to 1 CIT + 1 CTF
IN-PERSON EVENTS			
Annual Advisor Summit	GOLD Sponsor + 3 Passes	SILVER Sponsor + 2 Passes	OPTIONAL UPGRADES
Regional Advisor Luncheons	Exclusive	Sponsor	Recognition
Client Appreciation Events	Exclusive	Sponsor	Recognition
Event Speaking Opportunities	Featured	Yes	OPTIONAL UPGRADES
ONLINE EVENTS			
RIA Channel Webcast	Exclusive	—	—
Alta Trust Hosted Webinars	2 Exclusive	2 Co-Sponsored	Recognition
Webinar Speaking Opportunities	Featured	Yes	OPTIONAL UPGRADES
MARKETING VISIBILITY			
Event Promotion & Branding	Featured	Standard	Recognition
Linked-In Campaigns	Featured	Standard	—
Email Campaigns	Featured	Standard	Recognition
Press Releases	Featured	Standard	Select
Platform Website	Featured	Standard	Recognition
ADDITIONAL BENEFITS			
Advisor Contact Lists	Yes	Yes	—
Preferred Pricing Advisor Referrals	Yes	Yes	Yes
Reporting	Detailed	Detailed	—



SPONSORSHIP DETAILS



FUND CREATION AND PLACEMENT

Sponsorship in the Alta Trust Advisor Platform unlocks no setup fees to launch new CITs and Common Trust Funds or the option to include their best-in-class CITs from another trustee, combined with intentionally limited, premium visibility.

→ PREMIER FUND SELECT LIST Inclusion

Sponsors receive priority inclusion on the SELECT LIST, placing your strategies among a tightly curated group of best-in-class investment strategies funds available to advisors at institutional prices. This positions your CITs, ETFs, and Common Trust Funds at the top of advisors' consideration sets.

→ NO-FEE launches of CITs and Common Trust Funds

Gold THREE of each (\$60,000 value), Silver TWO of each (\$40,000 value), Build-Your-Own ONE of each (\$20,000 value).

Each vehicle typically carries a \$10,000 setup fee, making this benefit alone one of the most valuable components of the sponsorship. The result: faster launches, broader advisor adoption, and a significantly higher return on sponsorship dollars.

IN-PERSON ADVISOR ENGAGEMENT

Selective, in-person experiences put sponsors and their funds directly in front of advisors and firm leaders.

→ Alta Trust Annual Advisor Summit

Alta Trust's flagship annual gathering of senior RIA leaders, focused on modern approaches to investment strategy, asset structure, and advanced estate planning. This conference highlights how leading advisors are integrating sophisticated planning strategies with differentiated investment solutions to better serve complex client needs.

→ Regional Advisor Events

Regional events that bring advisors together to explore unique investment opportunities, estate planning and tax strategies, and how they can be applied in real client scenarios.

THOUGHT LEADERSHIP & EDUCATION

Sponsors have the opportunity to feature their funds and share insights in targeted webinars that deliver direct access to growth-minded RIAs.

→ RIA Channel Webcast

Exclusively for Gold Sponsors, these targeted, high-impact webcasts reach an average audience of 400,000+. They also see attendance of more than 1,000 engaged RIAs actively evaluating growth strategies, investment solutions, and platform enhancements. These sessions connect decision-makers with timely insights in a focused, evaluation-driven environment.

→ Alta Trust Hosted Webinars

Sponsors receive visibility and the opportunity to engage with advisors at our own series of webinars including:

» Executive Coaching for RIA Leaders

High-level coaching sessions led by Aaron Klein for RIA leadership teams focused on growth, differentiation, and execution.

» Estate Planning Webinar Series

Led by Alta Trust's estate planning attorney on advanced trust and tax strategies to help RIAs attract new clients and keep multigenerational relationships.

» Advisor Member Training

Practical training webinars focused on integrating estate, tax, and advanced investment solutions into everyday advisory practice.

» HNW Client Education

Client-facing educational webinars that help advisors engage high-net-worth families on complex planning topics and strengthen long-term relationships.



MARKETING VISIBILITY

Sponsors benefit from consistent, high-impact exposure across the channels advisors engage with every day.

→ Featured Placement

Sponsors receive featured placement across LinkedIn campaigns reaching targeted advisor audiences, platform-wide email marketing delivered directly to advisor inboxes, the platform website and high-traffic event landing pages, ensuring consistent visibility where advisors engage most.

→ Press & Public Announcements

Sponsors are spotlighted through coordinated press activity that amplifies reach and extends visibility beyond live events and webinars. These announcements help build momentum, reinforce market presence, and highlight sponsor leadership within the advisor community.

AND MORE...

Sponsors gain direct access to advisors, preferred pricing for advisor referrals, and clear insight into engagement and adoption across the platform.

→ **Advisors Contact Lists**

Sponsors receive access to a comprehensive advisor contact list, including all Alta Platform advisors as well as those participating at in-person and live events—supporting ongoing relationship development beyond individual touch points.

→ **Preferred Pricing**

Sponsors receive preferred pricing for any advisors they refer to the platform, reinforcing partnership and rewarding active participation in platform growth.

→ **Detailed Actionable Reporting**

Sponsors receive reporting on advisor reach, engagement, and fund adoption, providing clear visibility into advisor interaction, interest, and momentum over time.

JOIN US.

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