

**STEP**   
Miami

**2025**  
SUMMIT

**Honoring the Past,  
Innovating towards the Future.**



**SPONSORSHIP  
PACKAGES**





# Honoring the Past, Innovating towards the Future.

For 20 years, STEP Miami has been at the forefront of connecting and empowering professionals in the wealth management and private client industry. As we celebrate this milestone, the 2025 Summit will pay tribute to our rich legacy while embracing the future with bold innovation.

Inspired by the elegance and dynamism of the Roaring Twenties, this year's theme blends timeless Art Deco sophistication with a forward-thinking vision. Hosted at the iconic Biltmore Hotel, the Summit will bring together thought leaders, industry pioneers, and key decision-makers for insightful discussions, networking, and strategic collaborations.

Sponsoring STEP Miami Summit 2025 is an exclusive opportunity to align your brand with a legacy of excellence and be part of the next chapter in shaping the industry's future.

**Join us in celebrating 20 years  
of impact and progress.**



# Meet the Board



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**Sarah Jacobson**  
Officer



**Shawn P. Wolf**  
Officer



**Susie Belanger**  
Branch Administration &  
Event Organization





# The Event

**Our program is crafted to celebrate tradition while driving innovation, offering fresh insights and meaningful connections.**

The experience begins with a lively Welcome Reception, where attendees will gather to reconnect, exchange ideas, and set the tone for an engaging Summit ahead. Then, on the main Summit Day, immerse yourself in a carefully curated lineup of sessions led by industry pioneers and thought leaders, tackling the most pressing topics in wealth management and global trends.

As we mark 20 years of STEP Miami, we honor the past while shaping what's next. Join us in celebrating a legacy of excellence and embracing the future with innovation and vision.

## Event Highlight

Over 400 attendees at the 2024 Annual Summit

A Timeless Setting:  
The Biltmore Hotel

Premium program with esteemed speakers

Inspiring keynote session

Exclusive networking opportunities





The logo features the word "STEP" in a bold, white, sans-serif font, followed by a stylized "5" composed of white geometric shapes. Below this, the word "Miami" is written in a smaller, white, sans-serif font, centered within a white horizontal bar.

**STEP 5**  
Miami

# Sponsorship Opportunities

The year "2025" is rendered in a large, gold, stylized font. The "0" is a solid circle containing the word "SUMMIT" in a smaller, white, sans-serif font. The "2" and "5" are also stylized with sharp points.

**2025**  
SUMMIT



# BEE'S KNEES

## Platinum Sponsor



**EXCLUSIVE**

**Committed**

### **INCLUDES:**

Company's logo included on all the name tags to be used by the participants (STEP Miami's logo will also be included on the name tags);

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Brief opportunity (up to 15 minutes) to welcome the guests at the opening of the Summit;

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Four (4) all-access delegate passes and one (1) sponsor table delegate pass with limited access;

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Display table in designated sponsor area on Summit Day, October 23, 2025. First choice of table location (table size: 6 ft with 2 chairs). Promotional material may only be placed at designated display table;

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Inclusion of logo on all invitations and conference materials;

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List of Summit participants who opt in to share their contact information - name and email address. This list is sent out to the sponsors a week after the Summit;

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Company's logo, description, contact info and link to company website on [stepmiamisummit.com](http://stepmiamisummit.com);

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Video Exposure at the event on monitor;

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Custom video presence on social media.

# GATSBY

## Diamond Sponsor



**EXCLUSIVE**

### WELCOME PARTY EXCLUSIVE SPONSOR

On Thursday, October 22, sponsor has the opportunity to speak (up to 15 minutes) about your business. Specific mention of sponsor by STEP Miami Chair at the October 23 Summit Opening Remarks;

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A sign with company's logo will be placed near sponsor's exclusive display table (promotional materials allowed on table only);

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Sponsor may invite up to 10 additional guests to the cocktail party. Note, names of guests must be provided to STEP Miami by Wednesday, October 16. Additional guests will have separate name tags and will not be allowed to enter the Summit on Friday unless they are registered and paid;

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Summit Day - Friday, October 23, 2025: sponsor will have three (3) all-access delegate passes and one (1) sponsor table delegate pass with limited access; a display table in designated sponsor area. Promotional material may only be placed at designated display table. Second choice of table location (table size: 6 ft with 2 chairs);

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Inclusion of logo on all invitations and conference materials;

---

List of Summit participants who opt in to share their contact information - name and email address. Will be sent out to the sponsors a week after the Summit;

---

Company's logo, description, contact info and link to company website on [stepmiamisummit.com](http://stepmiamisummit.com);

---

Video Exposure at the event on monitor;

---

Custom video presence on social media.

# CAT'S PAJAMAS

## Sponsor

**EXCLUSIVE**

**15.000**

### INCLUDES:

Farewell Toast Sponsor.  
Option to speak at Toast for  
2 minutes

Option to speak/provide  
company message for 3 minutes  
on looping reel;

Special mention by Chair during  
event;

Booth located in Premier Area in the  
Exhibit Area;

List of Summit participants who opt  
in to share their contact information  
- name and email address.  
Will be sent out to the sponsors a  
week after the Summit;

Custom video presence on social  
media;

2 delegate passes;

# PUTTIN' ON THE RITZ

## Sponsor

**NON EXCLUSIVE**

**10.000**

### INCLUDES:

Option to speak/provide  
company message for  
3 minutes on looping reel;

Special mention by Chair  
during event;

Booth located in Premier Area in  
the Exhibit Area;

List of Summit participants who  
opt in to share their contact  
information - name  
and email address. Will be sent  
out to the sponsors a week after  
the Summit;

Custom video presence on  
social media;

2 delegate passes.



## MOONSHINE Sponsor

**NON EXCLUSIVE**

**7.000**

### INCLUDES:

Option to speak/provide company message for 3 minutes on looping reel;

Booth in Main Ballroom foyer;

List of Summit participants who opt in to share their contact information - name and email address. Will be sent out to the sponsors a week after the Summit;

Custom video presence on social media;

2 delegate passes.

## STARLIGHT Sponsor

**NON EXCLUSIVE**

**5.000**

### INCLUDES:

Logo/static message on own page with video loop;

Booth in Exhibit Area;

List of Summit participants who opt in to share their contact information - name and email address. Will be sent out to the sponsors a week after the Summit;

Static post on social media;

1 delegate pass.

## GLITZ Sponsor

**NON EXCLUSIVE**

**3.000**

### INCLUDES:

Logo on shared page on video screen that will stay up 30 seconds;

No booth;

List of Summit participants who opt in to share their contact information - name and email address. Will be sent out to the sponsors a week after the Summit;

Pre-designed social media post;

No discount on passes.

# STEP

Miami

# 2025 SUMMIT

For more information about sponsorship opportunities and to discuss how your organization can get involved, please contact:

**Website**     [stepmiamisummit.com](http://stepmiamisummit.com)

**Email**         [STEP.Miami@step.org](mailto:STEP.Miami@step.org)

## Thank you!