



STEP

Miami

2026

S U M M I T



**SHAPING THE NEXT
STEP IN LEGACY.**

SPONSORSHIP PACKAGES

The logo features the word "STEP" in a large, bold, white sans-serif font, followed by a stylized "5" that incorporates a square shape. Below this, the word "Miami" is written in a smaller, white sans-serif font, centered within a white horizontal bar.

STEP 5

Miami

2026

S U M M I T

STEP Miami plays a defining role in shaping conversations around governance, continuity and long-term stewardship in the private client and wealth management industry. Following the celebration of its 20-year milestone, the Summit now turns its focus to a defining question: how is legacy intentionally shaped for what comes next?

Centered on the theme Shaping the Next Step in Legacy, STEP Miami Summit 2026 explores how responsibility, values and purpose are carried forward across generations, from wealth creators to stewards, spouses and future leaders. The emphasis shifts from honoring what has been built to actively guiding how legacy evolves over time.

Hosted once again at the iconic Biltmore Hotel, a century-old symbol of vision and continuity, the Summit provides a setting that reinforces long-term perspective and thoughtful transition. More than a venue, the Biltmore reflects the importance of intentional decisions in shaping what endures.

SPONSORING STEP MIAMI SUMMIT 2026 OFFERS A DISTINCTIVE OPPORTUNITY TO ALIGN YOUR BRAND WITH LONG-TERM VISION, RESPONSIBILITY AND THE CONVERSATIONS SHAPING THE NEXT STEP IN LEGACY.



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THE EVENT

THE STEP MIAMI SUMMIT 2026 PROGRAM WILL EXPLORE HOW LEGACY IS SHAPED IN PRACTICE, REFLECTING THE SUMMIT'S FOCUS ON RESPONSIBILITY, CONTINUITY AND THE EVOLVING ROLE OF STEWARDSHIP ACROSS GENERATIONS.

The experience begins with a Welcome Cocktail that brings the community together to reconnect, exchange perspectives, and set the stage for meaningful conversations. The main Summit Day features a carefully curated program of sessions led by industry leaders and trusted advisors, addressing the most relevant issues influencing generational wealth, governance and the future of legacy.

STEP Miami Summit 2026 offers more than insight, it creates space for connection, reflection and forward-thinking collaboration. Join us as we engage in the conversations shaping the next step in legacy.

STEP  **2026**
Miami **SUMMIT**

EVENT HIGHLIGHT

Over 450 attendees at the 2025 Annual Summit

A Timeless Setting:
The Biltmore Hotel

Premium program with
esteemed speakers

Inspiring keynote session

Exclusive networking
opportunities





SPONSORSHIP OPPORTUNITIES

THE LONG VIEW

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);

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

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

Display table in designated sponsor area on Summit Day, October 22, 2026. First choice of table location (table size: 6 ft with 2 chairs). Promotional material may only be placed at designated display table;

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. This list is sent out to the sponsors a week after the Summit;

Company's logo, description, contact info and link to company website on stepmiamisummit.com;

Video Exposure at the event on monitor;

Custom video presence on social media.

THE SUMMIT CELEBRATION

Welcome Cocktail Sponsor

EXCLUSIVE

INCLUDES:

On Wednesday, October 21, sponsor has the opportunity to speak (up to 15 minutes) about your business. Specific mention of sponsor by STEP Miami Chair at the October 22 Summit Opening Remarks;

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

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 14. Additional guests will have separate name tags and will not be allowed to enter the Summit on Friday unless they are registered and paid;

Summit Day - Thursday, October 22, 2026: 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);

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;

Video Exposure at the event on monitor;

Custom video presence on social media.

THE LEGACY SWING

Golf Day Sponsor

EXCLUSIVE

INCLUDES:

On Wednesday, October 21, sponsor has the opportunity to speak (up to 15 minutes) about your business. Specific mention of sponsor by STEP Miami Chair at the October 22 Summit Opening Remarks;

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

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 14. Additional guests will have separate name tags and will not be allowed to enter the Summit on Friday unless they are registered and paid;

Summit Day - Thursday, October 22, 2026: 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);

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;

Video Exposure at the event on monitor;

Custom video presence on social media.

ENDURING FOUNDATIONS

Sponsor

EXCLUSIVE

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;

THE NEXT STEWARDS

Sponsor

NON EXCLUSIVE

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.

STEWARDSHIP 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.

NEXT CHAPTER 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.

IN THE MAKING 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.



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

Website stepmiamisummit.com

Email STEP.Miami@step.org

THANK YOU!