

# NEXT25

THE SOWELL SUMMIT



## Sponsor the future of Sowell

May 5–7, 2026 | The Ritz-Carlton  
Las Colinas, TX

Join us in Dallas next spring at the beautiful Ritz-Carlton, Las Colinas—a stunning backdrop for meaningful conversations, thoughtful planning, and a little celebration, too. Yes— we'll also be marking our 25th anniversary at Sowell. It's a milestone we're proud of, but what matters most is what comes next—and that's exactly what this Summit is all about.

At NEXT25, you'll be part of something bold. Join the Sowell advisors and delve into Sowell's most ambitious initiatives yet—innovations and partnerships designed to elevate how we serve clients, grow businesses, and lead in a rapidly evolving industry.

Our annual event brings together leading wealth advisors, investment experts, and strategic partners for a transformative experience that blends thought leadership, innovation, and collaboration. Our sponsorship program offers creative opportunities to showcase your brand, build relationships, and align with a trusted, fast-growing platform.

### Branding Opportunities

- **Visionary** Dinner
- **Visionary** Co-Branded Lounge
- **Pathfinder** Branded Charging Station Sponsor
- **Pathfinder** Bloody Mary Bar
- **Pathfinder** Lunch
- Breakout Track† (Pathfinder and above)
- Live Entertainment Sponsor (Summit)
- Early Bird Registration/Room Key (Summit)
- Live Entertainment Sponsor (Summit)
- Branded Advisor Swag Bag (Summit)
- Pre-conference Session† (Summit and above)
- Promotion or Swag Bag Items (Builder and above)

†Track/session categories: investing, marketing, operations and/or technology

### Visionary Partner

(Top Tier - \$35,000+)

Top-level sponsor positioning for brands aligned with innovation, transformation, and growth-minded leadership.

- Dinner sponsorship or co-branded networking lounge (Sowell Summit + your logo)
- Top tier logo placement on main stage, signage, slide deck, website and emails
- Exclusive main stage session
- Additional panelist opportunities
- Ultra premium exhibit space
- Attendee list with contact info
- Four conference passes

### Pathfinder Sponsor

(High Tier - \$25,000)

Designed for firms helping advisors navigate the evolving wealth management landscape.

- Cocktail reception/bar, lunch or branded charging station
- 2nd tier logo placement on main stage, event signage, website, slide deck, and emails
- Main stage session
- One panel speaker
- Premium exhibit space
- Sponsored bar or lunch
- Attendee list with contact info
- Three conference passes

### Summit Sponsor

(Mid Tier - \$10,000)

Ideal for firms focused on education, insights, and empowering the next wave of financial advisors.

- 3rd tier logo placement on event signage and website. Plus, see other branded opportunities.
- Exhibit space
- One panel speaker
- Two conference passes

### Builder Sponsor

(Entry-level Tier - \$5,000)

Perfect for emerging fintech, fund managers, and platforms that want visibility and connection.

- Exhibit space (if available)
- 4th tier logo placement on event signage and website
- One conference pass