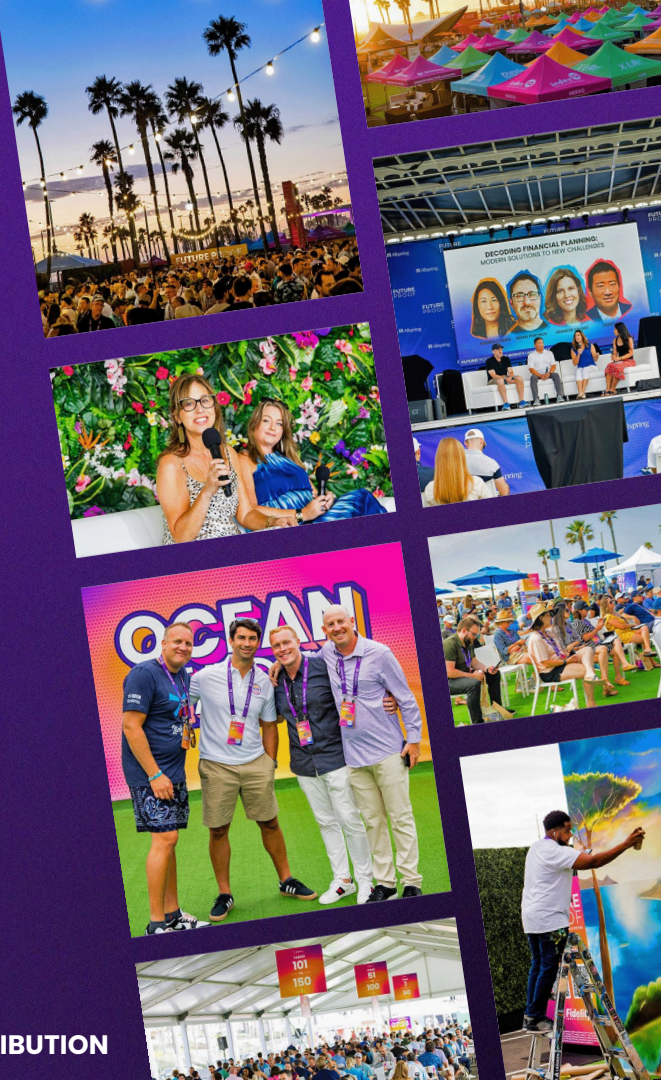


FUTURE PROOF OVERVIEW & CITYWIDE EVENT PLAN

FUTUREPROOF

MARCH 16-19, 2025 | MIAMI BEACH, FLORIDA

CONFIDENTIAL – NOT FOR DISTRIBUTION



EXECUTIVE TEAM



MATTHEW MIDDLETON
Founder & CEO



CHRISTINE CHERRY
Head of Strategic
Partnerships



NYLE BAYER
Chief Marketing Officer



LINDSEY MARKEWITZ
Head of Operations



MATTHEW HOUGAN
Co-Founder

SUPPORTED BY LEADING INVESTORS AND OPERATORS

GRAHAM TUCKWELL
Chairman, ETFS Capital
Founder & Former
Chairman, ETF Securities

ANIL AGGARWAL
Founder, Shoptalk
Founder, Money20/20

BARRY RITHOLTZ
Founder & CIO, Ritholtz
Wealth Management



JOSH BROWN
CEO, Ritholtz Wealth
Management

JASON WENK
Founder & CEO, Altruist

FOSTER WRIGHT
President, Coindesk

ABOUT FUTURE PROOF

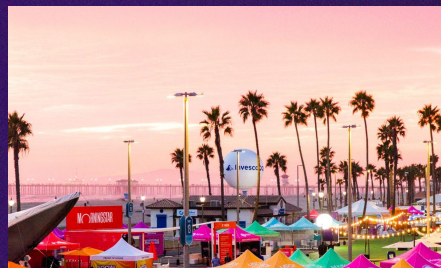
Future Proof is a B2B media and events company that leverages technology to serve the modern finance industry.

Our objective is to connect investors, financial advisors, fund managers, technology companies, and financial services firms. We aim to equip them with actionable insights, data, and connection points to efficiently raise and allocate assets, as well as make informed buying decisions.

We achieve this through a combination of in-person and digital events, facilitated one-to-one meetings, networking programs, and the production of research and thought leadership.




Future Proof launched in 2021 and has grown to become the world's largest event brand dedicated to the advancement of the modern finance industry. Currently, we operate two major events: the Future Proof Festival, which is the largest wealth management festival globally, and the Future Proof Retreat, which is the largest wealth management retreat in the world.

These events attract thousands of attendees annually, including influential investors, fast-growing financial advisors, wealth management decision-makers, investment managers, technology executives, and other providers of financial services.



FUTURE PROOF PARTNERS

Years of contributing to the success of our partners have afforded us the opportunity to collaborate with the most innovative companies in asset management, fintech, and financial services. Below is a core group of the 300+ sponsors for Future Proof events.

 ALLIANCEBERNSTEIN	BlackRock	 Dimensional	 Fidelity INVESTMENTS	 FRANKLIN TEMPLETON
Goldman Sachs	 Invesco	<i>John Hancock</i>	STATE STREET GLOBAL ADVISORS	Vanguard®

MEDIA PARTNERS

Live coverage of Future Proof events broadcasted from premier media.

AXIOS	BARRON'S	Bloomberg	 CNBC	WSJ
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AWARDS

Winner

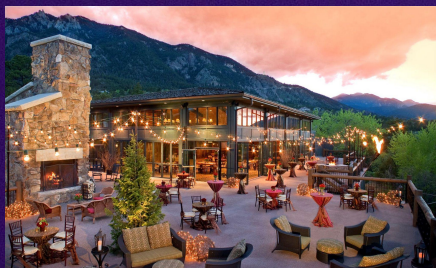
Best Trade or Consumer Show, 2023
BizBash Event Experience Awards

Winner

Best Conference Experience, 2023 & 2024
Kitces.com

Nominated

Industry Disruptors, 2023
WealthManagement.com



OUR EVENTS

Future Proof Festival (Huntington Beach, CA)

- 4,500 attendees (60% C-Level)
- \$6 trillion in assets represented
- 300 industry sponsors & exhibitors
- 30,000+ facilitated one-to-one meetings
- 200+ speakers participating in over 100 sessions

Future Proof Retreat (Colorado Springs, CO)

- 725 C-level attendees
- \$1.5 trillion in assets represented
- 100 industry sponsors & exhibitors
- 5,000+ facilitated one-to-one meetings
- 30+ networking experiences & group activities

Future Proof Citywide (Miami Beach, FL)*

- 3,000 attendees (60% C-Level)
- \$5.5 trillion in assets expected
- 200 industry sponsors & exhibitors
- 25,000+ facilitated one-to-one meetings
- 200+ speakers participating in over 100 sessions

**Projected in Year 1*



FUTURE PROOF FESTIVAL

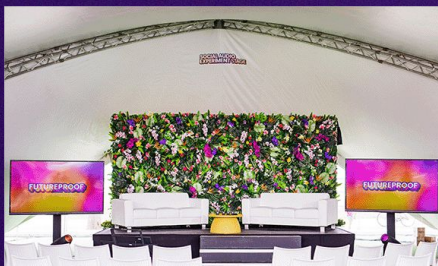
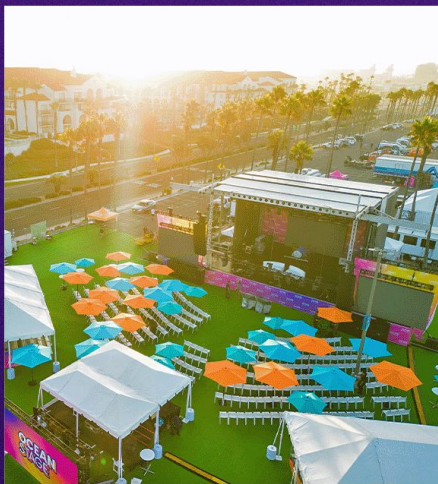
The event has been held annually in Huntington Beach, CA, every September since 2022.

THE BOARDWALK

Experience the industry's only entirely outdoor event with five football fields worth of action-packed content, live podcast recordings, brand activations, and 16,000+ 15-minute meetings.

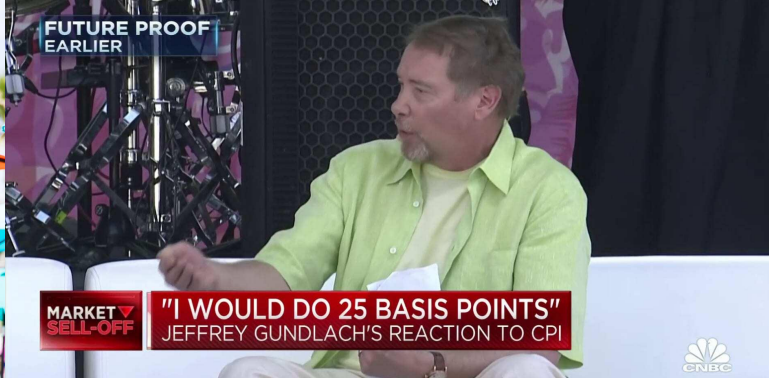






SESSION AREAS

Future Proof features multiple stages to support different formats and areas of focus. All sessions are recorded live and later broadcasted on digital streaming platforms.



PARTNER EXHIBITIONS

Future Proof exhibitions are designed to be fully customizable. A blank canvas to humanize finance brand and engage with their core audience.

The range of opportunities spans from turnkey 10x10's outfitted with furniture and branding, to customized double-decker containers and everything in between.





BREAKTHRU MEETINGS PROGRAM

Breakthru is the largest meetings program in the finance industry. Our tech-enabled platform leverages actionable data to modernize the way advisors, investors, investment managers, and fintechs discover one another, meet, and do business.

1,803 attendees opted in to participate in Breakthru Meetings

16,684 pre-scheduled one-to-one meetings were facilitated via the algorithm

98% meeting satisfaction rating among meeting participants





INTRODUCING FUTURE PROOF CITYWIDE

WHAT IS FUTURE PROOF CITYWIDE?

Future Proof Citywide is a new, large-scale annual event that aims to catalyze the development of the modern investment management industry. The event brings together an entirely new community of investors and finance professionals to address the trends that are expected to fundamentally transform the finance industry. These trends are driven by technological innovation, shifting investor preferences and demands, industry consolidation, heightened competition, and regulatory changes.

Future Proof Citywide serves as a groundbreaking annual platform for all stakeholders to navigate opportunities and challenges collaboratively, explore new investment paradigms, and foster innovation through cross-channel insights, partnerships, and deal-making.

Future Proof Citywide is a holistic, forward-looking event that not only addresses the current trends and challenges within the financial industry but also paves the way for future innovation and collaboration. It is for investors and industry professionals committed to not just adapting to changes but actively shaping the future of the financial industry.

OUR AUDIENCE – ATTENDEES

The inaugural event in 2025 is expected to attract 3,000–4,500 attendees, with the goal of scaling up to 10,000 attendees by the 2027 event.

INVESTOR AUDIENCE

RETAIL CHANNEL	INTERMEDIARY CHANNEL		INSTITUTIONAL CHANNEL	
Ultra High-Net Worth (UHNW) Investors	Registered Investment Advisors (RIAs)	Family Offices (SFO & MFOs)	Endowments	Foundations
	Wirehouse Advisors	Broker-Dealer Reps	Private Sector & Public Pension Funds	Insurance Companies
	Bank Wealth Managers	CFPs & IFAs	Sovereign Wealth Funds	Superannuation Funds
	Trust Officers	Robo-Advisors	Hospital & Healthcare Institutions	Institutional Investment Consultants

OUR AUDIENCE – SPONSORS

The inaugural event in 2025 is expected to attract 200 sponsor companies, with the goal of scaling up to 650 sponsor companies by the 2027 event.

SPONSOR AUDIENCE					
INVESTMENT MANAGEMENT	FINTECH & BIG TECH		FINANCIAL SERVICES		PROFESSIONAL SERVICES
Traditional Asset Managers	WealthTech	AdvisorTech	Private Banking Institutions	Custodian Banks	Consulting Firms
Institutional Asset Managers	RegTech	InsurTech	Brokerages	Real Estate Investment Services	Legal, Compliance, & Tax Advisory Firms
Alternative Investment Providers	Capital Markets	Banking	Index Providers	Market Makers & Liquidity Providers	Research & Data Companies
Private Equity & Venture Capital	Crypto & Blockchain	BigTech (Enterprise SaaS)	Credit Rating Agencies	Risk Management Firms	Marketing & Advertising Firms

THE EXPERIENCE – HOTELS

The immersive citywide experience will utilize various spaces in over a dozen hotels. It will include a quarter-mile-long outdoor beachfront area with multiple stages, experiential marketing activations, and learning opportunities. Attendees will have the opportunity to enjoy a remarkable selection of resorts, restaurants, and networking experiences, all conveniently located within a walkable footprint along Miami's South Beach area.

CURRENT LIST OF HOTELS ON HOLD

AC Hotel Miami Beach	Fontainebleau Miami Beach	Hyatt Centric South Beach Miami	Mondrian South Beach	Royal Palm South Beach Miami	The Gates Hotel South Beach
Cadillac Hotel & Beach Club	Gale South Beach	Kimpton Angler's Hotel South Beach	Moxy South Beach	SLS South Beach	The Lennox Hotel
Carillon Miami Wellness Resort	Grand Beach Hotel Miami Beach	Kimpton Hotel Palomar South Beach	National Hotel Miami Beach	The Betsy Hotel	The Goodtime Hotel
Courtyard Miami Beach South Beach	Hampton Inn Miami Beach	Loews Miami Beach Hotel	Nautilus Sonesta Miami Beach	The Confidante Miami Beach	Uma House by Yurbban
Eden Roc Miami Beach & Nobu Hotel Miami Beach	Hotel Greystone Miami Beach	Marriott Stanton South Beach	Residence Inn Miami Beach South Beach	The Gabriel South Beach Hotel	Link to Map View Here

THE EXPERIENCE – PROPOSED FOOTPRINT



THE EXPERIENCE – CITY SUPPORT

IDEAL SCENARIO

ACCESS: 11 DAYS

- Load-in: Tuesday, March 11, 2025 (5 days before event start date)
- Load-out: Friday, March 21, 2025 (2 days following event end date)

CITY SUPPORT

- Removal of existing furniture and equipment from beach space.
- Closure of certain beach entrances for safety purposes.
- Access to dedicated load-in and load-out area.
- Support from Miami Beach Visitors Bureau to help coordinate with hotel operations, restaurant owners, and other related vendors.

HOTEL SUPPORT

- Hotel room blocks. Minimum requirements include:
 - **2025:** 2,000 rooms (4,500 total room nights) from Saturday-Weds. (3/15-3/19)
 - **2026:** 4,000 rooms (9,000 total room nights)

FUTUREPROOF

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THANK YOU! QUESTIONS?

MATT MIDDLETON | CEO | matt@advisorcircle.com

