



Partnership & Growth Guide

Put Your Brand at the Center of the Self-Funding Movement

Build Relationships with the Industry's Most Successful Independent Agency Leaders & Advisers Who Are Winning Mid-Market Employers, Accelerating Self-Funding, and Transforming American Healthcare

THIS IS NOT A SPONSORSHIP GUIDE.

It is a roadmap for becoming part of the movement — building the adviser relationships, market authority, and strategic visibility that turn innovative solutions into industry adoption.

Questions? Contact Scott Cantrell, Director of Sponsorships | scott@nextgenbenefits.com

Table of Contents

Executive Summary 3

The Movement Transforming Employer-Sponsored Healthcare 6

The Expanding Market Opportunity 7

The NextGen Benefits Ecosystem 8

ASCEND Agency Growth & Leadership Experience..... 9

NEW for 2027: Vendor Growth Summit 17

ASCEND Sponsorship – Visibility & Engagement Opportunities..... 20

The NextGen Benefits Mastermind Partnership.....23

The Healthcare Lounge: Where the Industry Connects 30

Partnership Packages: ASCEND + Mastermind + Healthcare Lounge.....32

The NextGen Partner Network – An Ecosystem of Innovation.....35

Contact & Next Steps 36

READY TO SPONSOR NEXTGEN 2027?

Jump directly to **ASCEND Sponsorship Tiers** within the ASCEND section, **Mastermind Summit Sponsorship** in the Mastermind section, or the **Combined Packages** section for year-round options.



“For vendors, ASCEND is the best conference in the industry, by a wide margin. It’s not even close.”

Jayson Polo | CEO, Gryphon Rx

Executive Summary

NextGen Benefits is a growth and business-development ecosystem connecting ambitious independent benefits advisers with the innovative solution providers needed to transform employer-sponsored healthcare. Its mission reflects a clear belief: the U.S. healthcare system is not broken – it is engineered to preserve costly, opaque arrangements that benefit entrenched interests at the expense of employers and employees.

NextGen proof points

Through the **ASCEND Agency Growth & Leadership Summit**, the **NextGen Benefits Mastermind Partnership**, **Boot Camp** and advanced adviser training, and the **Healthcare Lounge**, NextGen equips advisers to move upstream, engage CEOs and CFOs, win larger employers, transition clients to self-funding, and manage healthcare as a supply chain. Over the past decade, NextGen advisers have reduced employer healthcare overspend by more than \$8.2 billion. They average 28 percent annual organic growth – more than triple the industry average – while winning mid-market accounts from national brokerages and earning the industry's highest honors.

For solution providers, NextGen offers entry into a high-performance community of decision-makers who influence thousands of employer health plans and determine which innovations reach the market.

Vendor growth training

New for ASCEND 2027, the **Vendor Growth Summit** helps solution providers strengthen and scale their businesses through sponsor-exclusive programming in sales, marketing, leadership, positioning, AI, and organizational growth. Adviser focus groups will also reveal how advisers discover, evaluate, and select solution partners.

Across ASCEND, the invitation-only Mastermind Partnership, and the Healthcare Lounge, NextGen creates something traditional sponsorship cannot: **continuity**. Organizations progress from introduction to recognition, credibility, and trusted partnership – becoming the solution providers advisers know, trust, and call when opportunities emerge.

Don't just sponsor the event. Own the relationship.

This is your invitation to join the movement that is changing healthcare by changing employer-sponsored health plans.



Who We Are

NextGen Benefits is the growth and business-development ecosystem for independent benefits agencies and the solution providers that make health plan transformation possible.

Through **ASCEND**, the **NextGen Benefits Mastermind Partnership**, **Boot Camp**, advanced training programs, and the **Healthcare Lounge**, NextGen equips agency owners and advisers to move upstream, win larger employers, engage CEOs and CFOs, transition clients to self-funding, and manage healthcare as a supply chain. Over the past 10 years, NextGen advisers have saved employers over \$8.2 billion by reducing healthcare overspend.

NextGen advisers are not merely learning theory. They are winning mid-market accounts from the nation's largest brokerages, earning the industry's highest honors, and producing average annual organic growth of 28 percent – more than triple the industry average.

The NextGen community ranges from focused, invitation-only gatherings of elite agency owners to ASCEND, our annual flagship experience bringing together more than 200 independent agency leaders and advisers. What connects every NextGen program is a commitment to meaningful growth, practical implementation, and the transformation of employer-sponsored healthcare.

What Makes the NextGen Community Unique

NextGen is not built to attract the largest possible audience. **It is built to attract the right audience.**

Our community consists of ambitious independent agency owners and advisers who are willing to challenge the fully insured status quo, rethink how healthcare is purchased, and invest in the knowledge and capabilities required to compete at a higher level.

These are not passive conference attendees. They are decision-makers, business builders, and healthcare transformation leaders. They select solution partners, influence thousands of employer health plans, and determine which innovations reach employers and their employees.

NextGen brings together both sides of healthcare transformation:

- Advisers with the relationships and influence to lead employers toward better health plans
- Solution providers with the tools, expertise, and innovations required to make those plans work

That shared mission creates a fundamentally different kind of community – one in which sponsors are not outsiders purchasing access to an audience. They are essential partners in the work.



Who Is Nelson Griswold?

Nelson Griswold is the founder and CEO of NextGen Benefits and the architect of a national movement helping independent benefits advisers transform employer-sponsored healthcare.

A former public policy analyst and president of two public policy think tanks, Nelson is the lead author of the bestsellers *Life & Death Decisions in the C-Suite* and *Healthcare's C-Suite Solution*. He has addressed audiences in more than 45 states and is nationally recognized for helping benefits advisers move beyond transactional brokerage, engage CEOs and CFOs, win mid-market employers, and lead the transition to transparent, self-funded health plans.

Nelson created ASCEND from a very specific vision.

He believed the industry needed an event designed not merely to place advisers and solution providers in the same building, but to encourage and facilitate the meaningful conversations that lead to ideas, relationships, partnerships, and business.

Those are meaningful conversations between advisers who can learn from one another. Those are also meaningful conversations between advisers and sponsors whose solutions can help those advisers transform employer health plans and grow their agency.

ASCEND was designed around those conversations – from its intimate environment and collaborative programming to Expert Roundtables, guided Exhibit Hall tours, sponsor introductions, and the new Vendor Growth Summit.

There is another important difference: **NextGen Benefits and its sponsors serve the same adviser market.**

Our clients and prospects are the independent agency owners and advisers who need innovative solutions to win and serve employer clients. Our sponsors need relationships with those same advisers to bring their solutions into the market.

When NextGen helps an adviser grow, win a larger employer, or move a client to self-funding, that success creates new opportunities for TPAs, PBMs, analytics firms, navigation companies, cost-containment solutions, and other members of the self-funded ecosystem.

That alignment is why ASCEND is the industry's most sponsor-centric event.

NextGen does not treat sponsors as a source of event revenue. We recognize them as essential partners in growing the movement – and we engineer ASCEND to help them grow along with it.



The Movement Transforming Employer-Sponsored Healthcare

The U.S. healthcare system is not broken. It's ENGINEERED.

Navigating Healthcare Transformation Without a Map

The American healthcare system was engineered to work exceptionally well for certain stakeholders – insurance companies, large brokerages, hospital systems, and pharmaceutical companies.

For decades, employers, advisers, solution providers, and patients have been forced to navigate a system designed to obscure incentives, sideline executive decision-makers, discourage self-funding, and preserve the fully insured status quo.

Employers are told healthcare costs cannot be controlled. Advisers are trained to manage renewals instead of managing the healthcare supply chain. Innovative solution providers compete for limited opportunities while millions of employers remain trapped in health plans engineered to drain their cash.

But there is another destination – one defined by NextGen's Vision:

The highest-quality healthcare – accessible and affordable – for all Americans.

The strategies and solutions required to reach that destination already exist. They are proven, readily available, and delivering measurable results for employers and employees.

The problem is not a lack of destination.

The problem is a lack of direction.

The Market Opportunity

8 million

employees projected to shift to self-funded plans by 2030

\$2 billion+

opportunity for benefits agencies

Source: McKinsey & Co., Reimagining US employer health benefits, Oct. 2024.

Every navigator needs a North Star.

NextGen Benefits is that North Star – the fixed point that orients advisers, employers, and solution providers to a common direction and guides them toward a better healthcare future.

But NextGen is not the hero of this story. Neither is ASCEND.

The heroes are the advisers transforming employer health plans, the innovators creating better solutions, and the employers taking control of their healthcare spending.

NextGen's role is to bring those heroes together – and help them change the trajectory of American healthcare.

The Expanding Market Opportunity

Sponsoring ASCEND Is not a conference expense. It's a market development investment.

For years, solution providers have competed for a share of a largely fixed self-funded market. **ASCEND is expanding the market itself.**

The greatest growth opportunity is not simply taking business from another vendor. **It is helping more advisers reach CEOs and CFOs, helping more employers move to self-funding, and helping more organizations manage healthcare as a supply chain.**

Every employer that transforms its health plan creates new opportunity across the entire self-funded ecosystem.

**More capable advisers → more employers
adopting self-funding → more covered lives in
transparent, value-driven health plans → greater
demand for the innovative solutions that make
transformation possible.**

That means new opportunities for TPAs, PBMs, cost-containment companies, analytics platforms, navigation services, and other innovative solution providers.

With its new 2027 growth programming for sponsors, ASCEND is becoming more than a growth engine for benefits agencies & advisers. ASCEND is becoming a market development engine for the entire self-funded industry.

The ASCEND 2027 Four-Stage Journey

Find True North

Understand what is really driving American healthcare — including misaligned incentives, the accelerating shift to self-funding, pharmacy dysfunction, fiduciary responsibility, and the forces preserving the status quo.

Build the Capability

Develop the skills and organizational capacity required to drive change: consultative selling, C-Suite engagement, selling self-funding, managing the healthcare supply chain marketing, leadership, technology and AI, and scalable agency growth.

Chart the Course

Discover the NextGen Toolset – the innovative solutions, proven strategies, and solution partners that make employer health plan transformation possible.

Lead the Movement

Turn knowledge into industry leadership through the NextGen Benefits Mastermind Partnership, Boot Camp, Giant Killer Awards, and the broader NextGen community.

ASCEND doesn't merely bring buyers and sellers together. It develops both the advisers and the solution providers, expands the market, and creates the demand that fuels growth throughout the entire self-funded ecosystem.

The NextGen Benefits Ecosystem

One Community. Three Ways In. **Year-Round Engagement.**

Sponsors who engage only at ASCEND are leaving considerable relationship equity on the table.

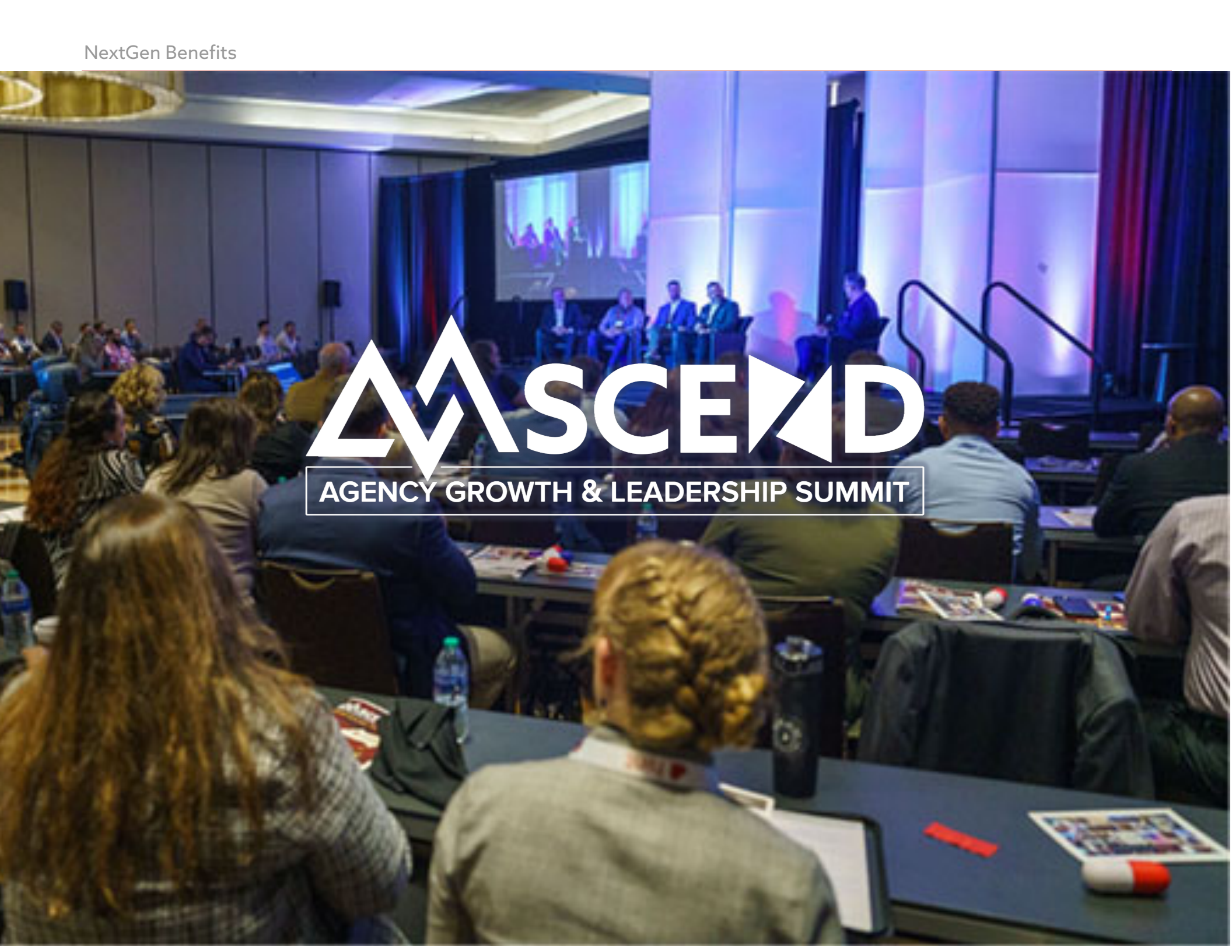
The NextGen Benefits ecosystem offers three distinct points of engagement throughout the year. Together, they create the repetition and continuity required to move your organization from **introduction to recognition** ➔ **recognition to credibility** ➔ **credibility to trusted partnership** with the industry’s most successful independent agency leaders and advisers.

ASCEND Annual Flagship Experience January 18–21, 2027 San Diego Convention Center More than 200 independent agency owners and advisers – each a principal-level decision-maker. Four days of education, strategic connection, solution discovery, and industry transformation.	Mastermind Partnership Twice-Annual Summits Q2 and Q3 Invitation-only An intimate community of 25–30 elite agency owners averaging 28% annual organic growth – more than triple the industry average. Members include Benefit Adviser of the Year, Broker of the Year, Most Effective Healthcare Consultant, and Top Women in Benefits Advising honorees.	Healthcare Lounge Monthly Executive Interview Series Hosted by Nelson Griswold Year-round Featured conversations reaching the broader NextGen community between live events. Guest appearances and program sponsorships extend your organization’s visibility, authority, and thought leadership throughout the year.
--	---	--

The Power of the Complete Ecosystem

The NextGen Insider & Trusted Partner Packages (page 30) combine ASCEND sponsorship, Mastermind Partnership access, and a featured Healthcare Lounge appearance — creating a sustained, year-round presence across all three NextGen touchpoints at a 20% package savings.

One Investment. Year-Round Access. Greater Influence. Maximum ROI.

A photograph of a large conference hall during the ASCE Agency Growth & Leadership Summit. The audience is seated at long tables, facing a stage where a panel of five men is seated. A large screen on the stage displays a presentation. The room is dimly lit with blue and purple stage lighting. The ASCE logo is overlaid in the center, with the text 'AGENCY GROWTH & LEADERSHIP SUMMIT' below it.

ASCE

AGENCY GROWTH & LEADERSHIP SUMMIT

ASCEND Agency Growth & Leadership Experience

The Flagship Annual Conference

January 18-21, 2027 | San Diego Convention Center | San Diego, California

Four transformative days bringing together more than 200 independent agency owners and advisers – including the principal-level decision-makers who select solution partners, influence employer purchasing decisions, and lead the industry’s transition to self-funding. For 2027, ASCEND expands its value proposition for sponsor partners. The new Vendor Growth Summit adds dedicated sales, marketing, leadership, and growth programming designed to help solution providers do more than build relationships at ASCEND – it helps them strengthen and scale their businesses.

This section provides everything you need to turn ASCEND 2027 into a powerful market-development opportunity:

The Audience. The Influence. The Proof. The Vendor Growth Summit. Sponsorship Opportunities. High-Impact Enhancements.

The Market Influence in the Room

16,000+	1.4M+	\$740.7M+	200+
Employer Groups Represented	Employee Lives Impacted	Total Agency Benefits Revenue	Agency Leaders & Advisers

Direct Access to the Key Decision Makers

94%	63%
of broker attendees do business with 3+ ASCEND sponsors	of attendees are agency leaders — the economic buyer

ASCEND puts you in direct contact with agency owners and influential advisers who select solution partners, manage employer relationships, and shape purchasing decisions for thousands of employer groups nationwide.

Not All Brokers Are Created Equal

Traditional Broker	NextGen Adviser
HR focused	C-Suite focused
Focus on renewals	Focus on client business objectives
Fully insured first	Self-funding first
Carrier-dependent	Independent & fiduciary-minded
Transactional	Consultative
Cost-tolerant	Supply chain strategist

THE PROOF — And Now, a Word from Our Sponsors

Flagship Case Study



4,000%
Organic Growth

"After 14 years in business, we started sponsoring every ASCEND since 2017, and it has been a primary catalyst for our 4,000% organic growth since then."

Deb Ault | Founder & President, Ault International Medical Management (AIMM)

Why Sponsors Invest in ASCEND



*"The **HOLY GRAIL** of tradeshows. Every time I turned around, I was talking to a qualified buyer."*

Lorainne Holly | benefitsCONNECT



"You come to ASCEND and meet the people you're going to be doing business with...the best and the brightest."

Renzo Luzzatti | US-Rx Care



"ASCEND is the most vendor-centric conference in the benefits industry."

John Troutman | MindClub America



"Attendees actually engage you, talk to you, get to know you. That's the big difference between this and the bigger conferences."

Scott Dail | MedOne

Flagship Case Study



5,700%
ROI on ASCEND Investment
*"When I calculate ROI, I look at profit – not revenue. **On a \$15,000 investment to sponsor ASCEND, I can directly track \$880,000 in profit.** That's a 5,700 percent ROI."*
Jayson Polo | CEO, Gryphon Rx



"We've already banked our ROI at the conference."

Julian Lago | Benepower



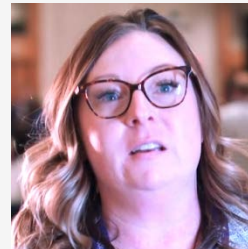
"People are not just walking past your booth – you're having substantive conversations. The sponsorship...truly felt valuable. We'll definitely be back."

Michael Hennessy | Diathrive



"If you want to get around disruptors, you need to come to ASCEND. It's an exciting place to be, an exciting time to be here."

Dan Meylan | Payer Compass



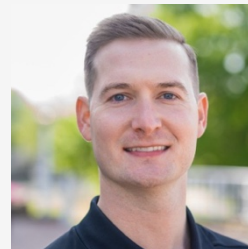
"These are the right folks we want to be talking to – creative minds looking for innovative ways to bring affordable healthcare to Americans."

Jodi Kaczewicz | iSolved



"The advisers at ASCEND are the ones closing deals and winning business. When I'm working to hit my number, these are the advisers I want in my pipeline."

Andrew McNerlin | ServeYou Rx



"What an awesome week! My first time at ASCEND, and I was not disappointed. I was excited to participate in the "speed dating" sessions as a solution provider."

Brandt Gribbin | Wellnecity

THE PROOF – ASCEND Advisers Don't Just Compete. They Win. BIG.

Independent NextGen advisers are winning larger, mid-market accounts from the nation's biggest brokerages. They are proven growth leaders. **The advisers below are all ASCEND veterans.** And they are exactly the advisers you want to know – and do business with.



RANDY HANSEN
CEO



420 Employees



ED LIGONDE
Partner



1,750 Employees



BILL HUGHES
President



570 Employees



SHABSAI SHUCHATOWITZ
CEO



4,180 Employees



BETH JOHNSON
President



500 Employees



JOSH HYMAN
CEO



Southern Benefit Systems

385 Employees



CHRISTOPHER OLSEN
CEO



350 Employees



DAN LABROAD
CEO



170 Employees



DANIEL MCCAULEY
CEO



712 Employees



These advisers are winning business from the giants. **Imagine what they could win with you.**



DIANA MILLER
Benefits Advisor



1,075 Employees



BROCK BERTRAND
President



205 Employees



DAN THOMPSON
CEO



1,200 Employees



SPENCER ALLEN
SVP



650 Employees



CHARLES WORLEY
Vice President

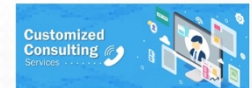


Southern Benefit Systems

700 Employees



LARRY TURELL
President



450 Employees



A more human resource.™



MARCY HEATH
CEO



130 Employees



BEN CONNER
CEO



300 Employees



DEKE LAPE
Benefits Consultant



800 Employees



Giant Killer Award winners — independent advisers who have proved that strategy, expertise, and results can overcome size and brand recognition by taking mid-market accounts from the nation's largest brokerages. New Giant Killers are recognized and celebrated onstage at every ASCEND. *The logos shown represent some of the giants that group defeated.*



The coveted
NextGen
Giant Killer Award

**Should your company sponsor the
2027 Giant Killer Award Ceremony?**



ASCEND Is the Industry's Most Sponsor-Centric Event

At most conferences, sponsor ROI is left to chance. **ASCEND is engineered to produce ROI.**

From the moment you commit through the final day of the event, every element of the ASCEND experience is designed to create meaningful, sustained engagement between sponsors and advisers.

ASCEND gives you the access, visibility, and opportunities to build the adviser relationships that grow your business.

Pre-Conference ROI Webinar

Turnkey preparation before you arrive. Learn proven strategies to maximize your investment — booth strategy, roundtable prep, scholarship distribution, and effective networking tactics.

Guided Tours of the Exhibit Hall

MANDATORY BREAKOUT
**Every Attendee. Every
Sponsor. Every Time.**

Attendees are guided through the Exhibit Hall in small groups. Each sponsor is a featured stop, giving a guaranteed opportunity to introduce your company.

Expert Roundtables

MANDATORY BREAKOUT
**85-90% Attendee
Engagement**

Five structured sessions, rotating groups of 4-7 brokers, 8 minutes per group. Unmatched reach in a focused, high-impact setting.

ASCEND Scholarship Program

Distribute half- (\$500) or full scholarships (\$1,000) to adviser prospects. Turnkey: NextGen makes it easy to implement.

A gift-based outreach tool.
Reach prospects with genuine value — not another sales ask.



*"I love the **ASCEND Scholarship Program**! It gives me a unique opportunity to contact my broker prospects, not with an ask, but with a valuable gift of a \$500 Scholarship or a \$1,000 Full Scholarship. I had a number of brokers attend as my guest last year, which was great for them and fantastic for me."*

Andrew McNerlin | ServeYou Rx



*"We always do the **[Expert] Roundtables**. Nobody else has those. Face-to-face, you get to meet the people, you get to talk to them, it's intimate."*

Renzo Luzzatti | US-Rx Care



*"The Exhibit Hall Guided Tours walk every adviser directly to me to hear my value proposition. **ASCEND helps me make connections like no other conference.**"*

John Troutman | MindClub America

IMAGINE A CONFERENCE BUILT TO GROW YOUR COMPANY.

Not simply a conference where your sales team stands in an exhibit hall waiting for advisers to walk by.
A conference where your people receive serious, practical training to help them:

SELL MORE EFFECTIVELY.

Consultative sales training that strengthens adviser outreach, improves sales conversations, and increases conversion.

PUT AI TO WORK.

Real-world applications of AI for prospecting, sales enablement, content development, marketing, and productivity.

MARKET MORE INTELLIGENTLY.

Sharper positioning, stronger messaging, better demand generation, and practical strategies for building your pipeline.

BUILD A STRONGER BUSINESS.

Leadership, sales management, organizational growth, and the disciplines required to scale successfully.

UNDERSTAND HOW ADVISERS BUY.

Candid insights directly from advisers about how they discover, evaluate, select, and remain loyal to solution partners.

YOU DON'T HAVE TO IMAGINE IT.

ASCEND 2027 introduces the industry's first *conference within a conference* devoted to sponsor growth.



Build your pipeline **through ASCEND.
Build your company **at** ASCEND.**

Full Vendor Growth Summit access is included with every ASCEND sponsorship.



New for 2027



VENDOR GROWTH
— SUMMIT —

The Conference Within the Conference – Built Exclusively for Sponsor Growth

Most conferences provide educational content for attendees and exhibit space for sponsors. **ASCEND 2027 provides serious growth education for both.**

While advisers participate in ASCEND programming, sponsor teams will have access to a dedicated curriculum addressing the critical challenges of growing a company in the self-funded marketplace.

This is not sponsor orientation or a collection of promotional presentations. **This is real business training designed to make your marketing sharper, your sales team more effective, your leadership stronger, and your organization better equipped to win adviser relationships.**

Instead of spending hours in an exhibit hall waiting for attendees to return, your team will spend that time building the capabilities needed to generate more opportunities, convert more prospects, and grow your business.

A Sponsor Growth curriculum

The Vendor Growth Summit will feature 4-6 sponsor-exclusive sessions running concurrently with adviser programming, with additional pre- and post-conference programming under consideration. This programming will not be wall-to-wall, leaving time for necessary work and adviser sessions.

Two Distinct Growth Opportunities

Grow THROUGH ASCEND

Build relationships with influential advisers who can introduce your solution to hundreds of employer groups and thousands of covered lives.

Grow AT ASCEND

Strengthen the sales, marketing, messaging, and leadership capabilities that make your entire company more successful – long after ASCEND adjourns.

Likely topics include:

- **AI for sales and marketing**
- **Consultative selling to advisers**
- **Sales leadership and management**
- **Brand messaging and market positioning**
- **Marketing strategy and pipeline development**
- **Organizational leadership and scalable growth**
- **Adviser focus groups revealing how advisers discover, evaluate, and select solution partners**

VENDOR GROWTH SUMMIT — Included at Every Sponsorship Tier (\$9,500 standalone value)

Every ASCEND sponsorship includes full Vendor Growth Summit access at no additional cost.

How do advisers want to buy?

The adviser focus groups may be the most revealing sessions of all – providing candid, unfiltered insight into what earns an adviser’s attention, what creates credibility, what undermines trust, and what moves a solution provider from initial conversation to preferred partner.



Extraordinary Value Built into Every Sponsorship

OPTION	INVESTMENT
Vendor ticket only (no Vendor Summit)	\$2,900
Vendor Growth Summit only	\$9,500
TRAILHEAD SPONSORSHIP (Incl. Vendor ticket + Vendor Summit)	\$7,500

Vendor Growth Summit included with every sponsorship. Every tier delivers more value than attendance alone—before a single adviser conversation occurs.

VENDOR GROWTH SUMMIT — Included at Every Sponsorship Tier (\$9,500 standalone value)

Every ASCEND sponsorship includes full Vendor Growth Summit access at no additional cost.

ASCEND Sponsorship — Visibility & Engagement Opportunities

Choose the exact level of brand visibility and adviser engagement you want at ASCEND.

PINNACLE TITLE SPONSOR

\$45,000

VALUE = \$78,500 – Only 1 Available

Premier Visibility

Event Title Sponsor recognition with special signage

Branding & visibility program across all channels

Pre-ASCEND social media campaign

Exclusive Stage Presence

Featured Main Stage Keynote Interview (20 minutes)

Speaking opportunity at the Gala Reception (5 minutes)

Edited video of your keynote for post-event use

High-Impact Engagement

Premium presence (not limited to a table) in the Innovation Showcase Exhibit Hall

Host an Expert Roundtable

Amplified Reach

Post-ASCEND LiveCast Event (webinar)

30-second sponsor-provided video shown during the conference

Access & Passes

Attendee List (including all contact info)

Up to 6 sponsor passes

SUMMIT

\$28,500

VALUE = \$46,500

- **Featured Keynote Innovator Interview on Main Stage (20 minutes)**
- **30-second sponsor-provided video shown during conference**
- **Attendee list (name, firm, phone, email)**
- Host an Expert Roundtable
- Exhibit table — Innovation Showcase
- Branding & Visibility Program
- **Up to 4 sponsor passes**
- Pre-ASCEND social media graphic
- **Vendor Growth Summit included**

PEAK

\$18,500

VALUE = \$30,000

- **NextGen Talk OR Panel Expert on Main Stage**
- Host an Expert Roundtable
- Exhibit table in the Innovation Showcase
- Branding & Visibility Program
- Attendee list (name, firm)
- Up to 3 sponsor passes
- Pre-ASCEND social media graphic
- **Vendor Growth Summit included**

ELEVATION

\$13,000

VALUE = \$23,500

- **Host an Expert Roundtable**
- Exhibit table in the Innovation Showcase
- Branding & Visibility Program
- Attendee list (name, firm)
- **Up to 3 sponsor passes**
- Pre-ASCEND social media graphic
- **Vendor Growth Summit included**

BASE CAMP

\$9,500

VALUE = \$12,000

- **Choice of any \$2,500 sponsorship option**
- Exhibit table in the Innovation Showcase
- Branding & Visibility Program
- Attendee list (name, firm)
- Up to 2 sponsor passes
- Pre-ASCEND social media graphic
- **Vendor Growth Summit included**

TRAILHEAD

\$7,500

VALUE = \$9,500

- Exhibit table in the Innovation Showcase
- Branding & Visibility Program
- Attendee list (name, firm)
- Up to 2 sponsor passes
- Pre-ASCEND social media graphic
- **Vendor Growth Summit included**

À la Carte Sponsorship Opportunities

\$15,000

- General Session Archway Entrance
- Exhibit Hall Archway Entrance

\$9,500

- Recharge Lounge
- Photo Booth

\$6,000

- Lanyard
- Tote Bag
- Welcome Reception
- Registration Desk
- Gala Cocktail Reception
- Giant Killer Awards Ceremony
- Mobile Event App
- Mastermind Private Lounge
- Caricature Artist
- Icebreaker Buttons

\$2,500

- Book Giveaway
- Attendee Contact Database
- TV Welcome Message
- Video Branding
- Directional Signage
- Chair Drop
- Email & Social Media Promo (Post-Event)

\$2,500 — Visibility Add-Ons

- Branding & Visibility Program
- Item/Gift in Tote Bag
- Recognition on Lobby Signage
- Pre-Session Slides
- ASCEND Website Placement
- ASCEND Program Placement
- Featured as ASCEND Sponsor in Social Media

Stage Time — Main Stage, General Session

- **Innovator Interview — \$17,500**
20-minute one-on-one with interviewer
- **Innovation Panel — \$7,500**
30-minute moderated, 3 experts
- **NextGen Talk — \$7,500**
10-minute curated solo presentation



**NEXTGEN
BENEFITS™**

MASTERMIND™



NextGen Benefits Mastermind Partnership

The Industry's Only Structured Peer-Exchange Program for Agency Leaders

Led by Nelson Griswold, the Mastermind Partnership is an intimate, invitation-only community of independent benefits agency owners. Where ASCEND reaches the broader movement, the Mastermind is where NextGen builds its deepest, most durable sponsor relationships — sustained access to the same 25-30 elite agency leaders, twice a year, in a room built for trust rather than transactions.

25+

Leading Benefits Firms

6,400+

Employer Clients

432,000+

Covered Employees

\$71M+

Agency Revenue

The NextGen Vision Statement

The highest-quality health care — accessible and affordable — for all Americans, starting with the employees of our clients.

The NextGen Mission Statement

Through Collaboration, Contribution, and Community, the Mastermind Partnership equips its members with the NextGen **TOOLSET | SKILLSET | MINDSET** needed to transform their agencies into NextGen Benefits Firms that can achieve the NextGen Vision and strengthens their Agency Growth Pillars — **PORTFOLIO | MARKETING | SELLING | MANAGEMENT** — to grow and scale their agency.

Mastermind Partner agencies average 28% organic annual growth — more than *triple* the industry average of less than 9%.



MASTERMIND SUMMITS – Where the Collaboration Occurs



Key West, FL



Phoenix, AZ



Nashville, TN



Baltimore, MD



San Diego, CA



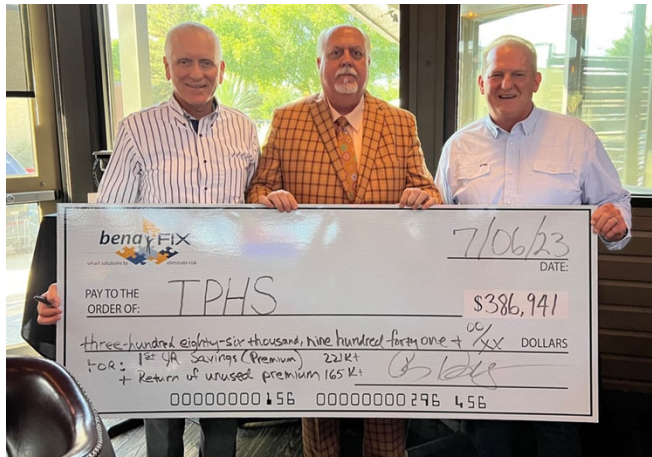
Cayman Islands



Columbus, OH

THE PROOF — NextGen Advisers Deliver Refund Checks

You know NextGen advisers can win mid-market accounts from bigger — even national — brokerages. Now see how these advisers change the game... **delivering health plan dividend checks — the plan's unspent claims dollars — instead of the usual renewal increases.**



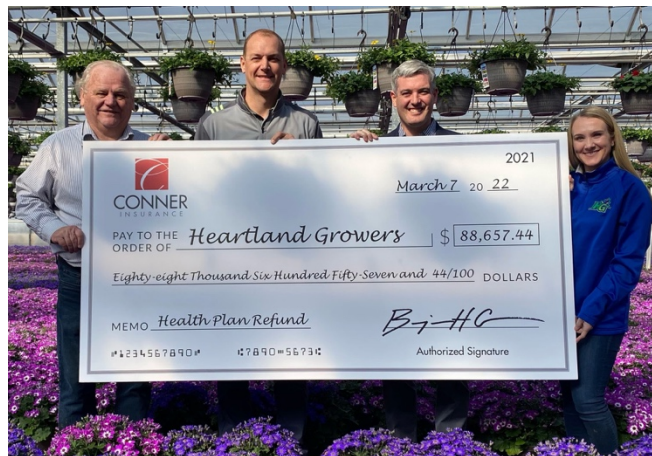
\$386,941 Healthcare Savings
TPHS, Fort Worth, TX
170 Employees

Healthcare Adviser
BILL HUGHES
Benafix



\$62,345 Healthcare Savings
Mur-Ci Homes, Inc., Nashville, TN
136 Employees

NextGenAdviser
CATHY AITKEN
Corporate Benefit Analysts



\$88,657 Healthcare Savings
Heartland Growers, Westfield, IN
97 Employees

Healthcare Adviser
BEN CONNER
Conner Insurance



\$1.23 Million Healthcare Savings
Workers Credit Union, Littleton, MA
334 Employees

Healthcare Adviser
JOHN HARRIS
CU Benefits Alliance

PROOF — Recognition That Signals This Room's Caliber

The Industry's Best Are in This Room

NextGen Benefits Mastermind Partners consistently outperform the industry – and the industry has taken notice.

Partners recognized include four *EBA* **Benefit Adviser of the Year** honorees, 2 *BenefitsPRO* **Broker of the Year** honorees, 9 *BenefitsPRO* **Broker of the Year Finalists**, a *Risk & Insurance* **Power Broker**, 9 *EBA* **Adviser Rising Stars**, and 12 *EBA* **Top Women in Benefit Advising**.

Meet the current Mastermind Partners whose leadership and results have earned national industry recognition:



ERIC SILVERMAN
Voluntary Disruption
Baltimore, MD



ED LIGONDE
Nielsen Benefits Group
Los Angeles, CA



BEN CONNER
Conner Insurance
Indianapolis, IN



DAN LABROAD
Ovation Life & Health
Dallas, TX

Sponsor the Mastermind Partnership – and put your brand in the room with some of the industry’s most accomplished and influential advisers.

The Leaders Behind the Headlines

When leading publications look for the advisers shaping the future of the industry, they repeatedly find them inside the NextGen Benefits Mastermind.

Meet a few of the more than a dozen NextGen Benefits Mastermind Partners who have earned cover-story recognition in leading industry and business publications.

benefitsPRO Cover Story



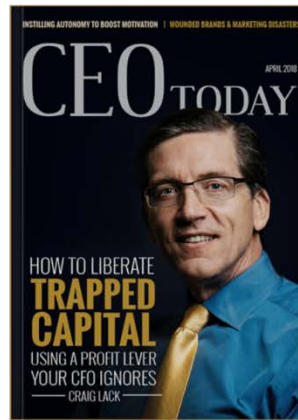
DAN THOMPSON
Thompson Risk
Naples, FL

Employee Benefit Adviser Cover Story



KIM ECKELBARGER
Tropical Benefits
Tampa, FL

CEO TODAY Cover Story



CRAIG LACK
ENERGI
San Juan Capistrano, CA

benefitsPRO Cover Story



ALLISON DE PAOLI
Altique Consulting
San Antonio, TX

Employee Benefit Adviser Cover Story



DAWN SHEUE
Summit Insurance
Jackson Hole, WY

Mastermind Summit Sponsorship Opportunities

Continue the momentum and relationships built at ASCEND by spending quality time with the high-performing NextGen agency owners in the Mastermind. Two exclusive, in-person Mastermind Summits held each year in the Spring and Fall, drawing the leaders of 25+ independent benefits firms from across the country. *Compare the price of two days with 25 top advisers to one night in a stadium suite.*

2027 SPRING SUMMIT: April 5-7, Dallas, TX | **2027 FALL SUMMIT:** TBA.

Speaking Sponsor	Reception or Dinner Sponsor	Summit Sponsor
\$10,500 / Summit	\$8,500 / Summit	\$5,000 / Summit
• 30-minute speaking slot — present to the entire group • Access to all Summit sessions, meals, receptions • 6' exhibit table (space permitting) • One post to Nelson's LinkedIn network (8K+ connections) • Dedicated email to Nelson's broker database (12K+ contacts) • \$1,500 ASCEND sponsorship credit	• Company name/logo on signage at the Reception or Celebration Dinner • Nelson presents a brief overview of your solution on Day 1 • Full access to all Summit sessions, meals, receptions • 6' exhibit table (space permitting) • One post to Nelson's LinkedIn network (8K+ connections) • \$1,000 ASCEND sponsorship credit	• Company name/logo featured in the Summit program • Introduced Day 1 as a valued sponsor • Full access to all Summit sessions, meals, receptions • 6' exhibit table (space permitting) • \$500 ASCEND sponsorship credit
THOUGHT LEADERSHIP PARTNER	HOSPITALITY PARTNER	SUMMIT PARTNER
Sponsor two consecutive Summits INVESTMENT \$18,000 Save \$3,000 + \$3,000 ASCEND credit Includes 3 LinkedIn posts, 2 dedicated emails, Sponsor Partner listing	Sponsor two consecutive Summits INVESTMENT \$15,000 Save \$2,000 + \$2,000 ASCEND credit Includes 2 LinkedIn posts	Sponsor two consecutive Summits INVESTMENT \$9,000 Save \$1,000 + \$1,000 ASCEND credit Includes 1 LinkedIn posts

THE Healthcare LOUNGE

Conversations with
Nelson Griswold



Healthcare Lounge: Where the Industry Connects

A Monthly Touchpoint with the NextGen Community Between Events

ASCEND and the Mastermind Summits create powerful moments of in-person connection. The **Healthcare Lounge** helps sponsors sustain that connection throughout the year.

Hosted by Nelson Griswold, the Healthcare Lounge is a monthly interview series featuring candid conversations with healthcare and employee benefits innovators. Each episode gives a featured guest the opportunity to share ideas, demonstrate expertise, and introduce the NextGen community to the thinking behind the organization and its solutions.

There is no booth, no crowded exhibit hall, and no competing conversation six feet away – just focused time with Nelson and an audience already engaged in the movement to transform employer-sponsored healthcare.

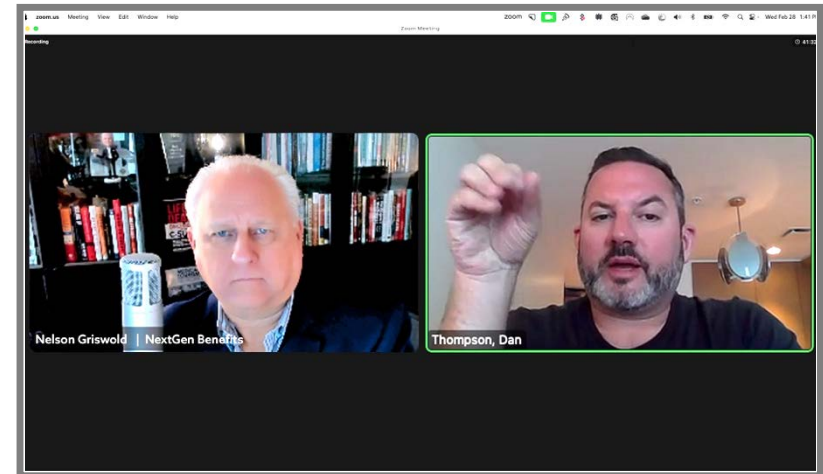
A Healthcare Lounge appearance helps move your organization beyond name recognition. It gives the NextGen community an opportunity to understand your perspective, your expertise, and the value you bring to advisers and their employer clients.

From Event Visibility to Year-Round Presence

A Healthcare Lounge appearance does more than add another impression. It gives the advisers who meet you at ASCEND or a Mastermind Summit a deeper understanding of who you are, what you believe, and why your solution deserves their attention.

Meet them at an event. Continue the conversation through the Healthcare Lounge. Build the familiarity and credibility that lead to trusted partnership.

The Healthcare Lounge is designed to complement, not replace, an ASCEND or Mastermind investment. The integrated packages in the next section provide the most efficient way to maintain a presence across all three NextGen touchpoints.



Guest Appearance Sponsorship.....\$5,000

- A featured, in-depth interview with Nelson Griswold
- A platform to share your organization's expertise, point of view, and approach
- Focused exposure to the NextGen Benefits community
- Greater credibility through association with NextGen
- Continued visibility between ASCEND & the Mastermind Summits
- Natural complement to ASCEND or Mastermind sponsorship

PARTNERSHIP PACKAGES: ASCEND + Mastermind + Healthcare Lounge

One Investment. Year-Round Access. Greater Influence. Maximum ROI.

ASCEND is where many of the most important relationships in the NextGen ecosystem begin.

But the greatest sponsor value comes from what happens after ASCEND.

A bundled partnership across ASCEND, the Mastermind Partnership, and the Healthcare Lounge gives your company repeated access to the same high-value advisers throughout the year — allowing you to move beyond a single introduction and become a recognized, trusted part of their world.

That matters because complex solutions are rarely adopted after one booth conversation, one presentation, or one event.

Trust is built through repeated exposure.

Your prospects see you at ASCEND. They hear your thinking. They meet your team. Then, instead of disappearing until the next conference, you remain present through the Mastermind community and the Healthcare Lounge — continuing the conversation, demonstrating your expertise, and strengthening the relationships that began at ASCEND.

From Visibility to Relationship to Revenue

Think of these packages as a year-long relationship-building platform.

ASCEND creates reach and discovery.

Meet hundreds of independent benefits advisers actively searching for better ways to control healthcare costs, improve outcomes, differentiate their agencies, and serve employers.

The Mastermind creates depth and trust.

Spend meaningful time in an intimate setting with a smaller group of highly successful, growth-minded agency owners and advisers whose relationships can become extraordinarily valuable to your company.

The Healthcare Lounge creates ongoing authority and familiarity.

Bring your expertise, ideas, and point of view to the NextGen audience through a featured conversation that continues working long after the interview is recorded.



Because the Real ROI Begins *after* the First Introduction.

Together, these platforms create something a traditional sponsorship cannot: **CONTINUITY.**

Instead of repeatedly reintroducing your company to the market, you build recognition. Instead of being viewed simply as another vendor, you become part of the conversations advisers are already having about healthcare transformation, agency growth, and better solutions for their clients.

Develop the critical relationships that get your emails returned and your phone calls answered by the advisers who are doing the deals that can grow your business.

Why This Matters

For most NextGen solution partners, the economics of a single successful adviser relationship can dwarf the cost of the entire partnership.

A productive relationship with the right independent agency can create access to multiple employer clients, hundreds or thousands of covered lives, and years of recurring revenue.

That is why we encourage our most serious solution partners to think beyond **event sponsorship** and invest instead in **market development**.

The objective is not merely to be seen.

It is to be remembered.

To be trusted.

To be called when an adviser has a client opportunity that fits your solution.



Choose Your Level of Year-Round Partnership

THE NEXTGEN INSIDER PACKAGE

Step inside the circle of elite advisers shaping the future of healthcare.

Designed for companies that want the strongest combination of visibility, access, thought leadership, and relationship-building across the NextGen ecosystem.

Your presence begins at ASCEND, continues through both 2027 Mastermind Summits, and extends into the Healthcare Lounge — creating multiple meaningful opportunities to engage the advisers who are leading the transition toward more transparent, accountable, high-performance employer healthcare.

THE NEXTGEN TRUSTED PARTNER PACKAGE

Move beyond sponsorship — become the partner they trust and call.

Built for companies that recognize the value of sustained relationships but do not require the highest level of visibility.

The Trusted Partner Package combines ASCEND exposure with intimate access to advisers at both Mastermind Summits and continued authority-building through the Healthcare Lounge.

It gives your company something no single conference can provide: **TIME.**

Time to build familiarity.

Time to demonstrate expertise.

Time to understand advisers' businesses.

And time for those advisers to discover where your solution belongs in the healthcare strategies they are building for employers.

Don't Just Sponsor the Event. Own The Relationship.

ASCEND gives you the introduction. The **Mastermind** gives you the relationship. The **Healthcare Lounge** gives you the continuing voice.

Together, they give you a far greater opportunity to become the company NextGen advisers **know, trust, recommend, and call when the right client opportunity appears.**

THE INSIDER PACKAGE

- **SUMMIT Level Sponsor** — ASCEND
- **SPEAKING Sponsor** — Both 2027 Mastermind Summits*
- **Guest Appearance on Healthcare Lounge**

* 30-minute speaking slot, 5-minute dinner slot, full event access, exhibit table

INVESTMENT: \$43,600 | Standard: **\$54,500**

Save \$10,900 (20%) PLUS \$3,000 ASCEND 2028 Credit

THE TRUSTED PARTNER PACKAGE

- **ELEVATION Level Sponsor** — ASCEND
- **DINNER Sponsor** — Both 2027 Mastermind Summits *
- **Guest Appearance** — Healthcare Lounge

* Branded dinner presence, 5-minute dinner speaking slot, full event access, exhibit table

INVESTMENT: \$28,000 | Standard: **\$35,000**

Save \$7,000 (20%) PLUS \$2,000 ASCEND 2028 Credit

The NextGen Partner Network — An Ecosystem of Innovation

ASCEND sponsors represent the most innovative, mission-aligned solution providers in the self-funded benefits space. The companies below have already joined the movement. Join them.

Contact & Next Steps

Ready to join the movement?

Ready to grow your business?

AttendASCEND.com

Or contact our sponsorship team to reserve your 2027 partnership.

Scott Cantrell

Director of Sponsorships, NextGen Benefits

scott@nextgenbenefits.com

attendascend.com | info@nextgenbenefits.com
