

# MORTGAGE STRATEGY

LEADERS FORUM



Mortgage Strategy Leaders Forum 2019

15 October 2019

etc.venues,  
200 Aldersgate,  
London EC1A 4HD  
+44 (0)20 3735 7700



## Get in touch

To find out more please contact:

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## Get involved

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Join the conversation and share your views with #msleaders19

## What can you expect?

The Mortgage Strategy Leaders Forum is the opportunity for senior leaders of broker firms working in and with the intermediary market to meet and discuss the main strategic issues in the sector and discuss between themselves and lenders how the industry can be improved to ensure customers are better served.

With formats ranging from thought leadership presentations to focused workshop discussions, the agenda offers plenty of opportunities to learn more about key issues and to network with your peers.

## How will you benefit?

**MEET:** Utilise vital networking opportunities built into the agenda with senior industry representatives

**CHOOSE:** A variety of presentations, workshops and interactive Q&A panels

**POSITION:** Place your key leaders at the forefront of insightful panel sessions

**ALIGN:** Partner your business with Mortgage Strategy and its team of acknowledged expert analysts

**DELIVER:** Be a source of trusted information to your potential clients

## KEY-THEMES FOR 2019:

Key topics for 2019 will be developed by the editorial and content teams working closely with our MS audience over the coming months.

These will include:

- Future economic outlook – the mortgage industry post-Brexit
- Political change and regulatory impacts (big focus on the mortgage market study)
- What next for the first-time buyer market
- How the buy-to-let sector is changing
- The rising importance of protection
- The growing role of technology Markets and competition
- And all you'd expect from the MS team

## What they said:

"The event is full of excellent content and is a must-attend for those with an eye on the future of the mortgage industry."

"An informative and interactive information giving and networking event - a must attend event for the leaders of the mortgage industry."

"I have thoroughly enjoyed attending this premier industry event over the past few years and always learn and pick up some thought-provoking ideas."

"I was initially a little nervous about attending the event as a relatively new business, but I found that I was made to feel welcomed and felt that I could have said more if I'd been braver. I'm glad I went and I've connected with some great and influential people as a result. I'd recommend all those who get the chance, to go."

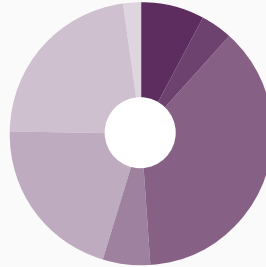
## Who will you meet?

The Mortgage Strategy Leaders Forum brings together major players in the mortgage industry to share views, benchmark business models and best practice and to shape the development of this dynamic sector.

### 2018 DELEGATE PROFILE:

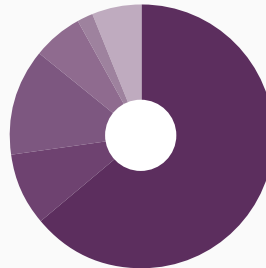
#### JOB FUNCTION:

Chairman / CEO	8%
IT / Technology / Operations	4%
Managing Director	38%
Marketing	6%
Mortgage Advisor/Broker	21%
Sales/BD/Strategy	23%
Senior Manager	2%



#### COMPANY TYPE:

Mortgage Broker	64%
Mortgage Club	9%
Mortgage Network	13%
Mortgage Packager	6%
Property Real Estate	2%
Technology Firm	6%



### NUMBER OF CASES RESPONSIBLE FOR:

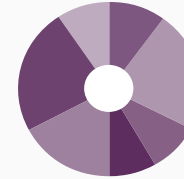
0 - 100	12%
101 - 1,000	19%
1,001 - 5,000	36%
5,001 - 10,000	10%
10,001 - 40,000	7%
40,001 +	17%

### MEMBER OF A NETWORK?

YES	48%
NO	52%

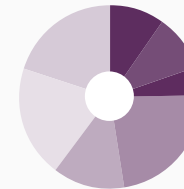
### CORE SPECIALISM:

Bridging	10%
Buy-to-let	22%
Commercial Mortgages	9%
Equity Release	8%
Protection	17%
Residential	23%
Second Charge Loans	9%



### VALUE OF LENDING:

< £10m	10%
£11m - £50m	10%
£51m - £100m	5%
£101m - £500m	23%
£501m - £1bn	13%
£1bn - £5bn	20%
>£5bn	20%



### DELEGATE OBJECTIVES

Keep up to date with market trends	93%
Find out about new products/services/innovation	71%
Network with industry colleagues	67%
Find out about new suppliers	17%
Keep an eye on the competition	14%
Assess the event with a view to speaking in the future	2%
Listen to a specific speaker	12%

### DELEGATE FEEDBACK

**100%** of delegates think the forum offers the chance to network with peers.

**97%** of delegates think the forum is an opportunity to attend sessions of the highest quality within the industry.

**97%** of delegates think Mortgage Strategy is the brand to get an independent industry view.

**95%** of delegates think the forum is the place to stay up to date with the industry.

**92%** of delegates think the forum offers you the chance to not just listen, but to become part of the discussion.

**86%** The forum offers the chance to meet the right suppliers.

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## Why partner with Mortgage Strategy events?

Mortgage Strategy is the leading source of news, analysis and insight for mortgage brokers and intermediaries within the UK.

In print and online Mortgage Strategy delivers the complete picture on key issues affecting mortgage specialists, from identifying key lenders in the adverse credit sector to analysing the impact of a potential recession on the housing market, through detailed interviews with lenders, independent commentators and other mortgage specialists.

### Mortgage Strategy events offer:

#### High quality content:

- Unique content from our many information sources and research reports
- Extensive research to uncover the hottest topics to put together compelling and controversial debate
- Industry partnerships through advisory boards, research and collaboration

#### High calibre audiences:

- Senior audience of decisions makers
- High percentage of individuals with purchasing responsibility

#### Thought leadership and branding:

- Exposure through dedicated marketing campaign
- Regularly refreshed data to keep up with the pace of change
- Insight built around our delegate audiences to inform and help you engage
- Align your brand with Mortgage Strategy and the team of expert analysts



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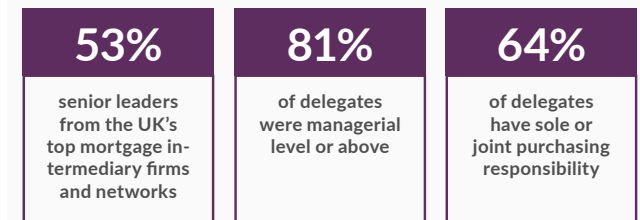
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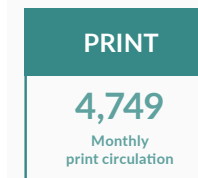
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### Mortgage Strategy Audience:

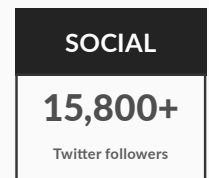
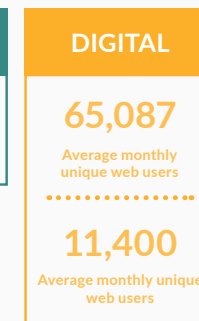
#### AUDIENCE:



#### PRINT:



#### DIGITAL/SOCIAL:



# Sponsorship Packages

All sponsorship packages benefit from:

**BRANDING**

- Logo on all marketing materials
- Profile on event website
- Logo on all event signage
- Sponsor logo will appear on all relevant print and online marketing

**AT EVENT**

- Pre-event delegate profiling report to be distributed to sponsors within 1 week of the event(exc. Networking Partners)

**POST EVENT**

- Access to all delegate data

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Headline Sponsor 1 OPPORTUNITY	Workshop Sponsor 4 OPPORTUNITIES	Presentation Sponsor 3 OPPORTUNITIES	Panel Sponsor 3 OPPORTUNITIES
<p><b>Pre-event</b></p> <ul style="list-style-type: none"> <li>• Opportunity to nominate delegates for invitation process</li> <li>• Content piece/ written speaker Q&amp;A               <ul style="list-style-type: none"> <li>• Promotion via event website and social media</li> </ul> </li> </ul> <p><b>At-event</b></p> <ul style="list-style-type: none"> <li>• Deliver 20-minute thought leadership plenary presentations               <ul style="list-style-type: none"> <li>• Topic and focus to be developed with input from Mortgage Strategy team</li> </ul> </li> <li>• Host 2 x 30-minute thought leadership workshops               <ul style="list-style-type: none"> <li>• Topic and focus to be developed with input from Mortgage Strategy team</li> <li>• Sole use of branded workshop room – recommend 2 roll up banners and literature</li> <li>• Delegates will choose 2 out of 4 workshops as part of their itinerary</li> </ul> </li> <li>• Participate in thought leadership panel               <ul style="list-style-type: none"> <li>• Debate session alongside 3-4 other senior industry speakers</li> </ul> </li> <li>• Networking opportunities               <ul style="list-style-type: none"> <li>• 3 reps to attend (including speaker)</li> </ul> </li> </ul> <p><b>Post event</b></p> <ul style="list-style-type: none"> <li>• Feature in post event write up in Mortgage Strategy magazine</li> </ul>	<p><b>Pre-event</b></p> <ul style="list-style-type: none"> <li>• Opportunity to nominate delegates for invitation process</li> </ul> <p><b>At-event</b></p> <ul style="list-style-type: none"> <li>• Host 2 x 30-minute thought leadership workshops               <ul style="list-style-type: none"> <li>• Topic and focus to be developed with input from Mortgage Strategy team</li> <li>• Sole use of branded workshop room – recommend 2 roll up banners and literature</li> <li>• Delegates will choose 2 out of 4 workshops as part of their itinerary</li> </ul> </li> <li>• Networking opportunities               <ul style="list-style-type: none"> <li>• 2 reps to attend (including speakers)</li> </ul> </li> </ul> <p><b>Post event</b></p> <ul style="list-style-type: none"> <li>• Feature in post event write up in Mortgage Strategy magazine</li> </ul>	<p><b>Pre-event</b></p> <ul style="list-style-type: none"> <li>• Opportunity to nominate delegates for invitation process</li> </ul> <p><b>At-event</b></p> <ul style="list-style-type: none"> <li>• Deliver 20-minute Thought leadership plenary presentation               <ul style="list-style-type: none"> <li>• Topic and focus to be developed with input from Mortgage Strategy team</li> </ul> </li> <li>• Networking opportunities               <ul style="list-style-type: none"> <li>• 2 reps to attend (including speakers)</li> </ul> </li> </ul> <p><b>Post event</b></p> <ul style="list-style-type: none"> <li>• Feature in post event write up in Mortgage Strategy magazine</li> </ul>	<p><b>Pre-event</b></p> <ul style="list-style-type: none"> <li>• Opportunity to nominate delegates for invitation process</li> </ul> <p><b>At-event</b></p> <ul style="list-style-type: none"> <li>• Participate in Thought leadership panel               <ul style="list-style-type: none"> <li>• Debate session alongside 3-4 other senior industry speakers</li> </ul> </li> <li>• Networking opportunities               <ul style="list-style-type: none"> <li>• 1 rep to attend</li> </ul> </li> </ul> <p><b>Post event</b></p> <ul style="list-style-type: none"> <li>• Feature in post event write up in Mortgage Strategy magazine</li> </ul>
		<b>Exhibition and Networking Partner</b> 6 OPPORTUNITIES	<b>Networking Partner</b> UNLIMITED OPPORTUNITIES
		<b>At event</b>	<b>At event</b>
		• 1x rep to attend	• 1x guest pass (no speaker)
<b>Additional Sponsorship Opportunities:</b>			
		Coffee Station Sponsor	Delegate bag
		Lanyard Sponsor	Twitter wall