



National Association of Estate Planners & Councils  
*1120 Chester Avenue - Suite 470, Cleveland, Ohio 44114*

***Mailing List Policy***

All sponsors and exhibitors will receive four pre-conference mailing lists of attendee contact details (name, designations, firm name, mailing address, email address and processing date) for use in promoting their attendance at the annual conference and/or the hosting of supplemental events\*. These lists will be emailed to the sponsorship primary and marketing contact at 4, 3, 2 and 1 week(s) prior to the start of the program. Sponsors only will also receive a post-conference attendee list. By accepting delivery of these lists, a sponsoring or exhibiting company agrees to the terms outlined below.

- NAEPC and National Association of Estate Planners & Councils names or logos may not be used on any material mailed by user. The sponsoring or exhibiting company **must** reference their attendance at the "56<sup>th</sup> Annual NAEPC Advanced Estate Planning Strategies Conference".
- User may use attendee contact information for an approved use once each time an attendee list is distributed (no more than a total of four email messages or mailings may be sent pre-conference and sponsors with access to a post-conference list can send one email message or mailing post-conference). User may not copy, replace, or duplicate the information contained within, any portion thereof, or extract or retain any information there from. User may not at any time permit any attendee names and addresses to pass into the hands of any other person, association, organization, or company. Any prohibited or unauthorized use by user shall constitute a material breach of the sponsorship agreement and may exclude company from participation in future years.
- Any post-conference mailing must take place within sixty (60) days of receipt of the list.
- User will hold the provider harmless against any damages or claim of damage, costs and reasonable attorney fees, arising out of any actual or alleged impropriety or illegality of mailed matter or infringement of trademark, trade name, or copyright belonging to others.
- User agrees to forward within thirty (30) days following receipt, any letters or other documents (or copies thereof) containing complaints by attendees regarding the user's mailing, the matter transmitted therein, or the offered product or service.
- The user is solely responsible for determining that the information provided is sufficiently accurate for the user's purposes.

*\*See rules and regulations addressing the hosting of supplemental events. Advance notice required.*

*The Association of Choice for Estate Planning Professionals*