

# 55<sup>th</sup> Annual NAEPC Advanced Estate Planning Strategies Conference

with Pre-Conference Sessions for  
Estate Planning Council Leaders

## COLLABORATION • EDUCATION



### Early Bird Discount •

2017 Sponsors & Exhibitors receive 10% when a commitment is received by 01/12/18.

All others receive a 5% discount! Register early and save!

November 6 - 9, 2018

**MARRIOTT HARBOR  
BEACH RESORT & SPA**

Ft. Lauderdale, FL

**SPONSOR & EXHIBITOR PROSPECTUS**



New in 2018!

Boost your presence with unique add-on enhancements. See pg. 3 for more details.

Wifi · Water Station · Breakfast · Keycard · Luggage Storage · Power Station · Fun Run

# MATRIX OF OPPORTUNITIES

	PREMIER (PAGE 4)	PARTNER (PAGE 5)	PRINCIPAL (PAGE 6)	EXHIBITOR (PAGE 8)	SPONSOR YOUR WAY (PAGE 7)
	\$19,500	\$12,500	\$7,500	\$2,500	\$4,250
Included Registrations	6	5	4	2	2
Discipline Exclusivity & Right of First Refusal for 2018	●				↑
Airline Reimbursement for Two	●				
General Session Presentation During Main Conference ( <i>limit 2</i> )	●				
Present Webinar for NAEPC Members	●				
Invitation to Attend Private Awards Breakfast	●				
Complimentary Speaker Introduction, General Session	●				
Sponsor of Welcome Reception	●				
Overnight Accommodations for Two Rooms, Two Nights	●	●			
Logo/Hyperlink in Newsletter, <i>NAEPC News</i> , for Year of Support	●	●			
Expanded Exhibition Table	●	●			
General Session Visual Recognition During Attendee Arrival	●	●			
Company Logo on Full Version of Registration Materials	●	●	●		
Provide Lanyard for Conference Attendees			●		
Logo on Cover of Registrant E-Materials	●	●	●		
Premium Exhibit Booth Placement	●	●	●		
Logo on Attendee Bag	●	●	●		
Verbal Recognition from Podium	●	●	●		
Logo/Hyperlink on <i>NAEPC Journal of Estate &amp; Tax Planning</i>	●	●	●		
Conference Attendee Mailing List	pre & post	pre & post	pre & post	pre only	
Insert Item into Attendee Bag	●	●	●	●	
Speaker Introduction (Fee Applies)		opt-in	opt-in	opt-in	
Sponsor Bonus Session (Fee May Apply)	n/a	included	opt-in		
Logo on Conference Signage	●	●	●		
Recognition/Hyperlink in Conference Messages to Attendees	logo	logo	printed name		
Ad in Registrant Materials	full page	full page	full page	half page	
	Learn more by turning to...	PAGE 4	PAGE 5	PAGE 6	PAGE 8
					PAGE 7

Choose from a list of options based on what fits your needs and goals best!

# • ADD-ON ENHANCEMENTS

Enhancements are available to all sponsors and exhibitors as an option to boost event participation. See something you like? Act fast, options are limited! **Please note that any firm-provided materials must be provided to NAEPC no less than 2 weeks prior the conference. Refunds cannot be granted for firm-supplied materials received after the deadline.** Enhancements are only available to registered sponsors.

Selection	Description	Add-on Fee
<b>Wifi</b> <i>2 sponsors accepted</i>	Conference attendees appreciate the option of having Wifi during the conference program. Your support includes logo placement on the instruction card each attendee receives at registration and on the landing page where attendees access Wifi, and logo placement on conference signage.	\$4,000
<b>Guestroom Keycard</b> <i>1 sponsor accepted</i>	Showcase your company to attendees at check-in and through their stay with prominent branding and exclusivity. Company-supplied graphic will be placed on one side of the guestroom keycard.	\$5,500
<b>Green Water Stations</b> <i>1 sponsor accepted</i>	Help us help the environment by sponsoring water stations provided in the general session and exhibit hall space from Wednesday - Friday. You provide a water bottle with your logo that gets distributed to each registrant as they check-in, NAEPC provides the water stations complete with a sign or "sleeve*" on each cooler that shows your firm logo. <i>*sleeve offered when available</i>	\$2,000
<b>Mid-Morning Coffee</b> <i>1 sponsor accepted</i>	Attendees will appreciate your sponsorship of the mid-morning coffee station, available following breakfast and up to the morning break from Wednesday – Friday. NAEPC will supply a sign on the coffee station that includes your logo.	\$1,500
<b>Breakfast</b> <i>1 sponsor accepted per day</i>	Help us prepare conference attendees for a long day of learning by sponsoring a conference breakfast. NAEPC will supply a sign near the food stations that contains your logo.	\$2,000
<b>Lunch</b> <i>1 sponsor accepted per day</i>	Help us nourish conference attendees by sponsoring the exhibit hall luncheon. NAEPC will supply a sign near the food stations that contains your logo.	\$2,500
<b>Departure Snack Station</b> <i>1 sponsor accepted</i>	The conference program ends at or near noon on Friday, let's work together to make sure that attendees have nourishment to travel on home! Your sponsorship of the "departure snack station" includes signage with your logo.	\$3,000
<b>Luggage Storage</b> <i>1 sponsor accepted</i>	Signage provided within luggage storage area near conference facilities	\$500
<b>Power</b> <i>1 sponsor accepted</i>	Logo placement on signage near pods of power and on charging station, both in general session space	\$1,500
<b>Notepad</b> <i>1 sponsor accepted</i>	You supply the notepads and NAEPC will make sure that they are at each place setting in the general session room at the beginning of each morning	\$750
<b>Pedometer</b> <i>1 sponsor accepted</i>	Interested in helping conference attendees track their steps each day? Each attendee will receive your firm-supplied pedometer at their place setting at the general session on Wednesday morning.	\$750
<b>Fun Run</b> <i>1 sponsor accepted</i>	Each year a group of conference attendees braves 5:45 am to participate in the NAEPC "Fun Run/Walk". Help us provide them with a piece of fruit and water or sports drink and your firm-supplied tee shirt or other fitness-related item at the conclusion of the walk/run. <b>Sponsor participation is encouraged!</b>	\$500
<b>Guestroom Delivery</b> <i>Multiple accepted Wed/Thur, must be different disciplines</i>	NAEPC will distribute your firm-created and printed piece to each attendee under their guestroom door while they are away at sessions	\$1,500

# • PREMIER

# \$19,500

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The Premier Sponsorship is exclusive to one company in each of the following six disciplines, offered first-come, first confirmed:

Accounting · Appraisal · Banking / Trust Services · Financial Planning · Insurance · Legal

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*Benefits include:*

- 6 full conference registrations that can be used for either a company representative or gifted
- Company logo with hyperlink in the NAEPC newsletter, *NAEPC News*, for the entire calendar year of conference support from the time of commitment
- Logo and hyperlink placement on the *NAEPC Journal of Estate & Tax Planning*, the association's well-read online resource for professionals, from time of commitment through April 30, 2019
- Logo on full registration brochure when commitment is received on or before June 1, 2018
- Opportunity to present a webinar for NAEPC during the calendar year of support (application found on pg. 16 required with commitment form, content must be approved by NAEPC)
- Logo on all conference attendee messages and confirmations
- Access to the pre- and post-conference attendee mailing list for use in notifying attendees of your presence at the event and one-time follow up (see page 11 for information governing usage of list)
- Standard coach airfare reimbursement for 2 company representatives to travel to and from the conference from anywhere in the United States (maximum value \$500 per ticket)
- Reimbursement of two nights of standard lodging (room & tax charges only) for two company representatives at the conference hosting property (NAEPC will move two rooms to the Master Account prior to the conference)
- Right of first refusal for the 56<sup>th</sup> Annual NAEPC Advanced Estate Planning Strategies Conference if commitment is received on or before December 31, 2018

*While attending the conference, Premier Sponsors will enjoy the benefit of:*

- Opportunity to present an attendee-appropriate general session during the main conference program (see page 13 for additional information) **Two available, offered first approved, first confirmed**
- Expanded and prominently-placed exhibition table (the equivalent of two standard 6 ft. table top booths) – Additional exhibitor information can be found on page 8 of this document
- The most prominent company logo on all conference signage
- Verbal recognition daily from the podium
- Company logo displayed on the daily welcome screen as attendees enter the opening session
- Company logo placed on the cover of the materials each educational registrant receives
- Noted as the sponsor of the Welcome Reception in the Exhibit Hall
- Ability to offer a two-minute speaker introduction of a nationally-known general session speaker
- Invitation for company representatives to attend the private NAEPC Board of Directors Awards Breakfast (date of breakfast to be determined - or equivalent event, should schedule change)
- Full-page ad in the registrant materials
- Logo placement on, and company insert in, the attendee welcome bag

# • PARTNER

# \$12,500

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## *Benefits include:*

- 5 full conference registrations that can be used for either a company representative or gifted
- Company logo with hyperlink in the NAEPC newsletter, *NAEPC News*, for the entire calendar year of conference support from the time of commitment
- Logo and hyperlink placement on the *NAEPC Journal of Estate & Tax Planning*, the association's well-read online resource for professionals, from time of commitment through April 30, 2019
- Logo on full registration brochure when commitment is received on or before June 1, 2018
- Logo recognition on all conference attendee messages and confirmations
- Access to the pre- and post-conference attendee mailing list for use in notifying attendees of your presence at the event and one-time follow up (see page 11 for information governing usage of list)
- Reimbursement of two nights of standard lodging (room & tax charges only) for two company representatives at the conference hosting property (NAEPC will move two rooms to the Master Account prior to the conference)

## *While attending the conference, Partners will enjoy the benefit of:*

- Expanded and prominently-placed exhibition table (the equivalent of two standard 6 ft. table top booths) – Additional exhibitor information can be found on page 8 of this document
- Company logo on all conference signage
- Verbal recognition daily from the podium
- Company logo displayed on the daily welcome screen as attendees enter the opening session
- Company logo placed on the cover of the materials each educational registrant receives
- Full-page ad in the registrant materials
- Logo placement on the attendee welcome bag
- Company insert in the attendee welcome bag
- Ability to offer a two-minute speaker introduction of a nationally-known general session speaker
- Opportunity to present an attendee-appropriate sponsor bonus session during the main conference program (see page 14 for additional information)

# • PRINCIPAL

# \$7,500

*Benefits include:*

- 4 full conference registrations that can be used for either a company representative or gifted
- Logo and link placement on the *NAEPC Journal of Estate & Tax Planning*, the association's well-read online resource for professionals, from the time of commitment through April 30, 2019
- Logo on full registration brochure when commitment is received on or before June 1, 2018
- Printed name recognition on all conference attendee messages and confirmations
- Access to the pre- and post-conference attendee mailing list for use in notifying attendees of your presence at the event and one-time follow up (see page 11 for information governing usage of list)

*While attending the conference, Associates will enjoy the benefit of:*

- Standard exhibition table – Additional exhibitor information can be found on page 8 of this document
- Company logo on all conference banner signage
- Verbal recognition daily from the podium
- Company logo placed on the cover of the materials each educational registrant receives
- Full-page ad in the registrant materials
- Logo placement on the attendee welcome bag
- Company insert in the attendee welcome bag

*To enhance the value of participation, Associates may choose to:*

- Opt-in to provide a 2-minute introduction of a conference speaker – information to do so will be provided in the final sponsor/exhibitor kit (\$500 fee applies)
- Offer a Sponsor Bonus Session (fee applies, see below)
- Provide the lanyard all attendees will be provided with upon registration (Company has option of providing NAEPC with a double bulldog or no-twist lanyard or allowing NAEPC to order lanyard at company expense). **This opportunity is available first committed, first confirmed and cannot be shared among Principal sponsors.**

## BECOME A SPONSOR BONUS SESSION PROVIDER • additional \$2,500



By opting in, you are able to host an attendee-appropriate *Sponsor Bonus Session* on either Thursday or Friday morning. See page 14 for additional details!

Please note, an application is required at the time your initial commitment form is received.

*\*Bonus Sessions are available first committed, first confirmed with priority given first to Partner Sponsors and second to those companies that provided a session the prior year.*

# • SPONSOR YOUR WAY

## \$4,250

The “Sponsor Your Way” option allows conference supporters to choose the benefits that are most meaningful to their firm from the list below.

*Benefits of Sponsor “Your Way” include:*

- 2 full conference registrations
- Access to the pre- and post-conference attendee mailing lists for use in notifying attendees of your presence at the event (see page 11 for information governing usage of list)
- Standard exhibition table
- Full-page ad in the registrant materials
- Company insert in the attendee welcome bag
- Choose up to **FIVE** options from the list below

*Please indicate your FIVE preferred benefits below (check if completing electronically) and submit this page with your commitment form.*

Expanded exhibition space **OR** Premium booth placement (please chose only one)

Standard electrical in booth

Logo and link on *NAEPC News* newsletter from time of commitment through calendar year end

Logo and link on *NAEPC Journal of Estate & Tax Planning* from time of commitment through April 30, 2019

Complimentary speaker introduction

Printed name recognition on all conference messages & confirmations

One additional full conference registration that can be used for either a company representative or offered as a gift

Reimbursement of two nights of standard lodging (room & tax charges only) for one company representative at the conference hosting property

Invitation for up to two company representatives to attend the private NAEPC Board of Directors

Awards breakfast on a date to be determined (or equivalent event, should schedule change)

## BECOME A SPONSOR BONUS SESSION PROVIDER • *additional \$2,500*



By opting in, you are able to host an attendee-appropriate *Sponsor Bonus Session* on either Thursday or Friday morning. See page 14 for additional details!

Please note, an application is required at the time your initial commitment form is received.

*\*Bonus Sessions are available first committed, first confirmed with priority given first to Partner Sponsors and second to those companies that provided a session the prior year.*

# • EXHIBITOR

# \$2,500

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## *Benefits include:*

- 2 full conference registrations (additional representatives may be registered at the time the final sponsor kit is distributed in late summer, a \$300 per person fee applies)
- Access to the pre-conference attendee mailing list for use in notifying attendees of your presence at the event (see page 11 for information governing usage of list)

## *While attending the conference, Exhibitors will enjoy the benefit of:*

- Standard exhibition table
- Half-page ad in the registrant materials
- Company insert in the attendee welcome bag

## *To enhance the value of participation, Exhibitors may choose to:*

- Opt-in to provide a 2-minute introduction of a conference speaker – information to do so will be provided in the final sponsor/exhibitor kit (\$500 fee applies)

## GENERAL EXHIBITION INFORMATION •

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### *Shipping & Receiving*

All sponsors and exhibitors are asked to ship their materials directly to the hotel; NAEPC does not use an exhibition company. Instructions will be provided in the final sponsor kit.

### *Set Up & Tear Down*

Set up: Tuesday, November 6, 2018 – time to be determined

Tear down: Immediately following lunch on Friday, November 9, 2018

### *Booth Assignments*

All exhibitor booth assignments are handled internally.

### *Hall Hours*

The Annual NAEPC Advanced Estate Planning Strategies Conference Exhibit Hall will be open during meal and break periods beginning after set up on Tuesday, November 6, 2018, concluding after lunch on Friday, November 9, 2018. The Welcome Reception and all meals and breaks will take place in the Exhibit Hall and offers an excellent opportunity to spend time with the conference attendees. A final schedule of events will be published in the full conference brochure and within the final sponsor kit.

### *On-Site*

Each fully-carpeted exhibitor area will be equipped with one 6 ft. dressed table, one chair, a wastebasket, and an identification signage.

Due to space limitations, only table top displays are permitted (with the exception of Premier and Partner Sponsors.) Retractable signage, when placed in a location that does not interfere with the flow of traffic and sight lines, is acceptable.



**55<sup>TH</sup> ANNUAL NAEPC  
ADVANCED ESTATE PLANNING STRATEGIES CONFERENCE  
COMMITMENT FORM & INVOICE ·**

**Step 1; choose your level of support and desired add-on item:**

	Commitment Level	Amount	Exhibition Space	General Session? (application req'd, pg. 15)	Host Bonus Session? (application req'd, pg. 15)	Provide Lanyard?
	Premier Sponsor	\$19,500	yes / no	yes / no	n/a	n/a
	Partner Sponsor	\$12,500	yes / no	n/a	yes / no	n/a
	Principal Sponsor	\$7,500	yes / no	n/a	yes (fee required)	yes / no
	Sponsor Your Way (submit pg. 7 with form)	\$4,250	yes / no	n/a	n/a	n/a
	Exhibitor	\$2,500	yes	n/a	n/a	n/a
	Add-on Choices (note preference)	\$ _____	n/a	n/a	n/a	n/a

**Step 2; tell us about your company:**

**HOW SHOULD YOUR COMPANY NAME APPEAR IN OUR MATERIALS? Please be exact.**



\_\_\_\_\_

Primary Contact Name \_\_\_\_\_

Telephone # \_\_\_\_\_ Email \_\_\_\_\_

Address \_\_\_\_\_

City, State & Zip Code \_\_\_\_\_

By signing below, I/we agree to comply with the rules & regulations outlined within the sponsorship packet.

Signature \_\_\_\_\_

Title \_\_\_\_\_

Our specialty is (check all that apply):

Accounting

Appraisal

Banking / Trust Services

Business Valuation

Financial Planning

Insurance

Legal

Life Settlements

Software

Other (please describe)

\_\_\_\_\_

Marketing / Promotional Information Contact Details (this person will receive a copy of the sponsor kit)

Company Name \_\_\_\_\_

Contact Name \_\_\_\_\_

Telephone # \_\_\_\_\_ Email \_\_\_\_\_

Address \_\_\_\_\_

City, State & Zip Code \_\_\_\_\_

**Step 3; provide payment details ...**

Enclosed is our \$ \_\_\_\_\_ check payable to "NAEPC" **or**

Bill credit card number \_\_\_\_\_ Exp. Date \_\_\_\_\_

Amount \$ \_\_\_\_\_ Name as it appears on card \_\_\_\_\_

Signature \_\_\_\_\_

Full payment required at the time commitment form is returned to NAEPC. **Please retain a copy of this page as your receipt.**

**By returning an executed commitment form, sponsor/exhibitor agrees to abide by rules & regulations outlined on pages 10 & 11.**

Direct inquiries about sponsorship opportunities to Ed Socorro • [esocorro@NAEPCmarketing.org](mailto:esocorro@NAEPCmarketing.org) / (312) 600-5303

National Office: 1120 Chester Ave., Ste. 470 • Cleveland, OH 44114 • (866) 226-2224 • [conference@naepc.org](mailto:conference@naepc.org)

# RULES AND REGULATIONS •

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## ***Act of God •***

In the case of cancellation of the conference, or unavailability of the exhibit hall, due to Acts of God, war, threats or acts of terrorism, governmental authority, fire, strike, labor disputes, or any other cause beyond the control of the NAEPC, this agreement shall terminate, and the Association shall not be responsible for any damages or expenses incurred by the sponsor or exhibitor in connection therewith.

## ***Assignment of Exhibit Space •***

Assignment of space will be determined by the NAEPC. NAEPC reserves the right to rearrange the floor plan in the event of conflicts, either in advance of the conference or on-site.

## ***Cancellation Policy •***

All sponsor / exhibitor commitments are non-refundable.

## ***Character of Exhibits •***

No exhibit shall be permitted to interfere with another exhibit, impede access to another exhibit, use the space of another exhibit, or interfere with the free use of the aisle in front of any exhibit. All exhibit materials, including decorations, exhibit display, and audiovisual equipment must conform to fire regulations and electrical codes of the hotel. Exhibitors with audible electric devices, videos and other exhibits or devices, which might prove objectionable to other exhibitors, may be required to accept booth assignments that diminish reasonable objections.

## ***Compliance •***

These instructions and regulations have been formulated for the best interest of the sponsor / exhibitor. Failure to comply may result in removal of an exhibit or cancellation of a sponsorship with no refund of fees to the sponsor / exhibitor.

## ***Dismantling •***

No booth may be dismantled until the official tear-down time. Any exhibitor that begins dismantling before this time may revoke their right to exhibit at any future NAEPC conference.

## ***Distribution of Printed Matter •***

Except from within rented space or as purchased as a part of this sponsor prospectus, exhibitors and sponsors shall not distribute printed matter, samples, souvenirs, and the like. Distribution of materials elsewhere in the exhibit hall, general or breakout session space, in the hotel or on hotel property is not permitted.

## ***Functions/Supplemental Events •***

All functions scheduled by a sponsor / exhibitor during conference dates must be submitted in writing and pre-approved by the NAEPC no less than 30 days prior to the start of the conference. This includes, but is not limited to, receptions, large group dinners, hospitality suites, or alternative transportation to off-site conference related events. Small group dinners are excluded from this requirement. Any sponsor / exhibitor deemed to have scheduled a competing event may revoke their right to participate in future NAEPC conferences. Pre-paid sponsor / exhibitor fees will NOT be refunded. **An application to host a function can be obtained by contacting NAEPC.**

## ***Insurance & Liability •***

Sponsor / exhibitor assumes entire responsibility and hereby agrees to protect, indemnify, defend, and save the NAEPC and its employees and board of directors harmless against all claims, losses and damages to persons or property, governmental charges or fines and attorney's fees arising out of or caused by Exhibitor's transportation, installation, removal, maintenance, occupancy, display or use of exhibits, or of the exhibition premises or a part thereof, or for the conduct of or harm caused to attendees at any special supplemental event hosted by the sponsors/exhibitor, excluding any such liability caused by the sole negligence of NAEPC and its employees and board of directors.

### ***Mailing List •***

Sponsors / exhibitors are entitled to a list of registered attendees one month prior to the start of the conference and sponsors receive a post-conference list within 30 days of the conclusion of the event. The electronic file is provided for the sole purpose of contacting attendees of the event to promote sponsor / exhibitor attendance. The list is provided for one-time use and may not be duplicated or entered into a database. Please see below for a full copy of mailing list guidelines.

### ***Programming •***

Sponsors / exhibitors may not conduct promotional or educational programming including lectures, demonstrations or audiovisual presentations during conference programming hours with the exception of approved Sponsor Bonus Sessions and Sponsor General Sessions.

### ***Property Damage •***

Sponsors / exhibitors are responsible for damage to property. No signs or other articles shall be posted, nailed, or otherwise attached to any of the pillars, walls, doors, floors, etc., in such a manner as to deface or destroy.

### ***Shipping Instructions, AV, Electricity & Telephone Service •***

Information regarding these items will be available to sponsors / exhibitors prior to the conference and will be distributed via US Mail and/or email.

### ***Staffing •***

A company representative must be in attendance at the exhibit booth during the hours the exhibit hall is open.

### ***Subletting Space •***

Subletting space is not permitted. Two or more firms may not exhibit in a single space unless arrangements have been approved by the NAEPC in advance.

## **MAILING LIST USAGE POLICY •**

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All sponsors and exhibitors receive one pre-conference mailing list of attendee addresses for use in promoting their attendance at the annual conference. Qualified sponsors also receive a post-conference mailing list. By accepting delivery of either list, a sponsoring or exhibiting company agrees to the terms outlined below.

- Attendee names and addresses may be used only for mailing purposes and may not be used for telephone or email contact.
- 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 may reference their attendance at the "55<sup>th</sup> Annual NAEPC Advanced Estate Planning Strategies Conference".
- User may use attendee names and addresses for an approved use one time only. User will not copy, replace, or duplicate the names and addresses or any portion thereof or extract or retain any information there from. User will 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.
- 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.

## ABOUT THE NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS ·

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The National Association of Estate Planners & Councils (NAEPC) serves its affiliated estate planning councils and their credentialed members and fosters the multi-disciplinary approach to estate planning.

### EXCELLENCE IN ESTATE PLANNING

We are a national organization of nearly 2,000+ Accredited Estate Planner® designees, over 270 affiliated estate planning councils, and their 29,000 credentialed members, all focused on establishing and monitoring the highest professional and educational standards. Our core and shared belief is that the team approach to estate planning best serves the client.

Visit us at [www.naepc.org](http://www.naepc.org).

## 55<sup>TH</sup> ANNUAL CONFERENCE & LOCATION INFORMATION ·

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The 3½ day conference program features one day devoted solely to affiliated local estate planning council leadership development. As such, the Tuesday, November 6, 2018 schedule provides educational sessions for leaders from the affiliated councils throughout the country. Approximately 130 council leaders attend the sessions on Council Leadership Day. The remainder of the program is of a technical nature and will feature a talented collection of local and national speakers. Additional attendees will join for the technical education portion of the event with total attendance anticipated to exceed 400. Each participant is a professional who devotes a major portion of his or her practice and business to estate planning. The conference will draw attorneys, trust officers, accountants, insurance and financial planners, and philanthropic professionals from across the country.

The Marriott Harbor Beach Resort is situated along a quarter-mile of private beach and provides tropical tranquility while offering easy access to Fort Lauderdale airport and top attractions including Las Olas Boulevard. Dive into the refreshing lagoon pool, take to the Atlantic for jet skiing or snorkeling, or pamper yourself at the full-service spa during off-program hours. When it's time to entertain, sponsors and exhibitors can savor innovative cuisine at one of the three on-property restaurants.

## SPONSOR / EXHIBITOR INFORMATION ·

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Sponsor and exhibitor arrangements will be confirmed when an executed commitment form has been received (page 9 of this packet). By completing, signing and returning an executed commitment form, the sponsor / exhibitor agrees to abide by the rules & regulations outlined on pages 10 and 11 of this document.

Conference attendee **postal mailing information** will be released one month prior to the start of the conference to sponsors and exhibitors and within 30 days of the conclusion of the conference to qualified sponsors, both in an electronic format for one-time use in contacting registered participants. Please note that email addresses are not available.

## GENERAL SESSION INFORMATION

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**Sponsored sessions are provided as a way for those organizations supporting the annual conference at the Premier level to enrich the educational experience of, and gain additional exposure to, Annual NAEPC Advanced Estate Planning Strategies Conference attendees.**

### *When are the sessions offered?*

One session will be offered during one time slot on Wednesday, November 7, 2018 and Thursday, November 8, 2018 (schedule is created by NAEPC.) **The sessions will be offered approved, first confirmed.**

### *What does my company need to do to participate?*

The participating company must sponsor at the Premier level of support and agree to provide content that is educational and appropriate for the audience and must submit a complete application (page 15 of this packet) along with the commitment form. Applications will be reviewed by NAEPC and a determination will be communicated within 30 days of receipt. Please note that NAEPC reserves the right to deny an application that is incomplete or does not meet the guidelines with regard to subject matter. Sales and marketing presentations are prohibited.

### *What will NAEPC do to promote our session?*

Those companies that have applied and been approved to participate by April 2, 2018 will have information about their session included in the registration brochures. Please note that the materials will clearly indicate that the program is a sponsored session and will include notice of the sponsoring company.

### *What will NAEPC provide for our session?*

- NAEPC will provide standard audio-visual equipment for the session (podium, microphone, screen, laptop, and projector).
- Complimentary conference registration for one (1) presenter\* for each session, attendee must be registered in advance.

### *What will NAEPC not provide as a part of our session?*

NAEPC will not provide reimbursement for speaker travel or lodging expenses outside of the reimbursement available as a part of the Premier support package. Should a speaker require an honorarium, that expense is the sole responsibility of the sponsor.

### *What About Continuing Education Credit?*

Since the session is a part of the main conference, and multi-disciplinary credit is requested for the program, sponsoring company must adhere to all requests and deadlines with regard to CE filing. This will include a full speaker biography, outline, completion of instructor registration forms, various state filing forms, and/or other documents as requested. Failure to comply with these requests may be cause for cancellation of the session with no refund of sponsorship fees to the sponsoring company.

### *How Many People Will Attend Our Session?*

NAEPC does not estimate or guarantee attendance for a sponsored session, but will make a reasonable effort to promote the session as described above when a timely commitment form and application is received. Those commitments received after April 2, 2018 will be promoted to the best of NAEPC's abilities online and in print.

*\*Registration is in addition to the 6 registrations that are furnished as a part of the benefits of the Premier level support.*

## BONUS SESSION INFORMATION

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**Sponsor Bonus Sessions are provided for those organizations supporting the annual conference\* to enrich the educational experience of the attendees. A Bonus Session is included for Partner Sponsors. Principal and “Your Way” Sponsors are eligible to opt-in to hosting a session.**

### *When are the sessions offered?*

These special sessions will be offered from 7:00 am – 7:50 am\*\* on the mornings of both Wednesday, November 7, 2018 and Thursday, November 8, 2018 (4 available, up to 2 concurrent sessions each morning).

### *What does my company need to do to participate?*

The sponsoring company must agree to provide content that is both timely and educational in nature, appropriate for the audience, and must submit a complete application (page 15 of this packet) along with the commitment form. Applications will be reviewed by NAEPC and a determination will be communicated within 30 days of receipt. Please note that NAEPC reserves the right to deny an application that is incomplete or does not meet the guidelines with regard to subject matter.

### *What will NAEPC do to promote our session?*

Those companies that have applied and been approved to participate by April 2, 2018 will have information about their session included in the hard-copy registration brochures. Please note that the materials will clearly indicate that the program is sponsored and will include notice of the sponsoring company.

### *What will NAEPC provide for our session?*

- NAEPC will provide standard audio-visual equipment for the session (podium, microphone, screen, and projector). Speakers are asked to bring their own laptop. Additional needs must be arranged with the hotel directly and all fees are the responsibility of the hosting company. NAEPC staff will provide the company representative with an appropriate contact to make arrangements.
- Complimentary conference registration for one (1) presenter\* for each Bonus Session, attendee must be registered in advance.

### *What will NAEPC not provide as a part of our session?*

NAEPC will not provide reimbursement for speaker travel or lodging expenses outside of the reimbursement available (if applicable) as a part of sponsor’s chosen support package. Should a speaker require an honorarium, that expense is the sole responsibility of the sponsor.

### *Can our Company Provide Continuing Education Credit for the Program?*

Yes! Although **NAEPC will not file a Sponsor Bonus Session for credit**, hosting companies are encouraged to do so to the extent that they are able. The hosting company is responsible for all filings, fees, forms, attendance monitoring, record retention, reporting of credit, and certificates of completion.

### *How Many People Will Attend Our Session?*

NAEPC does not estimate or guarantee attendance for a Sponsor Bonus Session, but will make a reasonable effort to promote the session as described above when a timely commitment form and application is received. Those commitments received after April 2, 2018 will be promoted to the best of NAEPC’s abilities online and in print.

\*\*Timing subject to change.

\*\*\*Registration is in addition to those that are furnished as a part of the benefits of the sponsor’s level of support.

# SPONSOR SESSION APPLICATION · (USE FOR BOTH GENERAL AND BONUS SESSIONS)

We are applying for a \_\_\_ general session / \_\_\_ bonus session (**choose one**)

Company Name \_\_\_\_\_

*Please complete this portion if the contact person is different than the person noted on the commitment form:*

Contact Name \_\_\_\_\_

Telephone # \_\_\_\_\_ Email \_\_\_\_\_

Address \_\_\_\_\_

City, State & Zip Code \_\_\_\_\_

Please provide information about your session below taking special care to note that the **information you include may be published in the annual conference registration materials**, if program is accepted.

Program Title (not topic) \_\_\_\_\_

Speaker Full Name & Professional Designations\* \_\_\_\_\_

*\*please attach a current biography for the speaker*

Program Description (one paragraph) \_\_\_\_\_  
\_\_\_\_\_

*\*please attach a detailed outline and PowerPoint presentation for the program*

### **For Sponsor Bonus Sessions Only:**

Do you have a preference with regard to the day of your session?      Thursday    Friday    No Preference  
*\*NAEPC will do its best to comply with the preference noted above, but will accommodate all programs on a first committed/first confirmed basis.*

Do you intend to provide continuing education credit for attendees\*?      Yes      No  
If yes, please explain which disciplines and/or type of credit will be offered here \_\_\_\_\_  
\_\_\_\_\_

*\*NAEPC is unable to file bonus sessions for CE credit. See page 14 for more information.*

By signing below, I/we agree to comply with the rules & regulations outlined within the sponsorship packet and for the type of session we have chosen. If my/our information is accepted, I agree that the subject matter will be appropriate to the audience, educational, not of a sales nature and not selling a product or service offered by my/our company, and will be an accurate reflection of what has been outlined within this page. Furthermore, I understand that NAEPC cannot guarantee attendance at my/our session.

Signature \_\_\_\_\_

Title \_\_\_\_\_ Date: \_\_\_\_\_

# WEBINAR APPLICATION ·

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Company Name \_\_\_\_\_

*Please complete this portion if the contact person is different than the person noted on the commitment form:*

Contact Name \_\_\_\_\_

Telephone # \_\_\_\_\_ Email \_\_\_\_\_

Address \_\_\_\_\_

City, State & Zip Code \_\_\_\_\_

Please provide information about your one-hour session below taking special care to note that the **information you include may be published in the marketing materials for the webinar**, if program is accepted.

Title (not topic)  
\_\_\_\_\_

Speaker Full Name & Professional Designations\* \_\_\_\_\_

*\*please attach a current biography for the speaker*

Program Description (one paragraph) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*\*please attach an outline and/or PowerPoint presentation for the program*

Please provide three learning objectives for the program (“attendees will learn”):

1 \_\_\_\_\_

2 \_\_\_\_\_

3 \_\_\_\_\_

By signing below, I/we agree that the subject matter will be appropriate to the audience, educational, not of a sales nature and not selling a product or service offered by my/our company, and will be an accurate reflection of what has been outlined within this page. Furthermore, I understand that NAEPC cannot guarantee attendance at my/our webinar.

Signature \_\_\_\_\_

Title \_\_\_\_\_ Date: \_\_\_\_\_