

The NAEPC Foundation *and*
National Association of Estate Planners & Councils
47th Annual Conference

SPONSOR & EXHIBITOR PACKAGE
2010

November 17 – 19, 2010

San Diego, *California*

Hyatt Regency Mission Bay Spa & Marina



The Association of Choice for Estate Planning Professionals

ABOUT THE NAEPC FOUNDATION ...

The NAEPC Foundation was formed in 2005 to educate the public regarding the benefits of the team concept of estate planning. The organization's primary objective is to educate the public on what estate planning is, why it is so important and how to develop a team of qualified estate planners to assist with their needs. This goal will be achieved through continuing education programs like conferences, seminars, forums and meetings about estate planning for practicing professionals and through quality public estate planning day programs in communities throughout the United States.

The **National Association of Estate Planners & Councils** (NAEPC) is a national organization of Accredited Estate Planner® (AEP®) and Estate Planning Law Specialist (EPLS) designation holders and approximately 220 affiliated estate planning councils focused on establishing and monitoring the highest professional and educational standards. NAEPC fosters public awareness of the quality services rendered by professionals who meet these standards. NAEPC builds a team approach involving cross-professional disciplines to better serve the public's need in estate planning. Visit www.naepc.org for more information about either organization.

CONFERENCE & LOCATION INFORMATION

The 3-day conference program features one day devoted solely to affiliated local estate planning council leadership development. As such, the Wednesday, November 17, 2010 schedule is geared toward information for leaders from the affiliated councils throughout the country. Approximately 125 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. An additional 275 attendees are expected for the technical education portion of the event. 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, insurance professionals, trust officers, accountants, financial planners and planned giving professionals from across the country.

Experience the beautifully transformed *Hyatt Regency Mission Bay Spa and Marina* (<http://missionbay.hyatt.com/hyatt/hotels/index.jsp>) while attending this event. A stunning transformation brings the epitome of California coastal chic into this San Diego hotel, with incredible ocean views, waterfront dining, a contemporary poolside lounge, an eco-friendly spa and redesigned guest rooms and meeting space. Delight in a water playground with three new pools and multiple water slides, waterfront health club, and a full-service marina with jet skis, sailboats, kayaks, sports fishing and whale excursions - everything you could wish for in a San Diego hotel. Coupled with a premier location close to famous sights, this luxurious property in San Diego has become the unparalleled choice for discerning travelers.

SPONSOR / EXHIBITOR INFORMATION

Sponsor and exhibitor arrangements will be confirmed when NAEPC receives an executed commitment form (page 12 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 13 and 14 of this document. Conference attendee postal mailing information will be released one month prior to the start of the conference in an electronic format for one-time sponsor / exhibitor use in contacting registered participants.

Exhibitor set-up will take place the morning of Wednesday, November 17, 2010 and teardown will take place during the afternoon of Friday, November 19, 2010. Exhibitors will be open during all meal and break periods for the duration of the conference and during the welcome reception the evening of Wednesday, November 17, 2010. Attendees from sponsoring / exhibiting companies are encouraged to attend all conference related events including the social event scheduled for the evening of Thursday, November 18, 2010 and the volunteer activity scheduled on Saturday, November 20, 2010.

DIAMOND

| | |
|------------------|---|
| Commitment Level | \$25,000 (one per industry noted below) |
| Payment Terms | \$10,000 due with commitment form Balance paid by August 2, 2010 |

Benefits

Special Benefits

- Exclusivity within each industry (accounting, appraisal/auction, disability insurance, financial planning, life insurance, legal and trust/banking). Assigned on a first come, first served basis
- Right of first refusal for 2011 conference participation at the Diamond Level (commitment must be received by December 31, 2010 to take advantage of this benefit)
- Noted as sponsor of Thursday evening social event, signage present onsite, six additional tickets to the social event
- Verbal recognition as the sole sponsor of a nationally recognized speaker*
- Logo on conference brochure– provided to 20,000 estate planning professionals in the United States (commitment must be received by April 30, 2010 to take advantage of this benefit)
- Opportunity to provide the conference registrant “goodie bag”

Conference Participation

- Expanded exhibition space (if desired) – *see page 11 for add'l exhibitor details*
- 6 full conference registrations

Pre-Conference Public Relations

- Listed on all NAEPC conference-related communications prior to event
- ***Extra benefit!*** Logo placement on the online publication *NAEPC Journal of Estate & Tax Planning* from the time of commitment through April 30, 2011 (www.naepcjournal.org)
- Logo on NAEPC website with a link to company website

On-Site Conference Public Relations

- Full-page ad in conference binder
- Recognition from podium during conference
- Prominent logo included on banner displayed on site during conference
- Opportunity to insert additional take away item into conference registrant “goodie bag”

**This benefit does not offer an opportunity to provide a speaker for the session.*

PLATINUM

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|------------------|--|
| Commitment Level | \$10,000 (unlimited per industry) |
| Payment Terms | \$5,000 due with commitment form Balance paid by August 2, 2010 |

Benefits

Special Benefits

- Verbal recognition as the sole sponsor of a nationally recognized speaker*
- Logo on conference brochure– provided to 20,000 estate planning professionals in the United States (commitment must be received by April 30, 2010 to take advantage of this benefit)

Conference Participation

- Expanded exhibition space (if desired) – *see page 11 for add'l exhibitor details*
- 4 full conference registrations

Pre-Conference Public Relations

- Listed on all NAEPC conference-related communications prior to conference
- Logo on NAEPC website with a link to company website
- ***Extra benefit!*** Logo placement on the online publication *NAEPC Journal of Estate & Tax Planning* from the time of commitment through April 30, 2011 (www.naepcjournal.org)

On-Site Conference Public Relations

- Full-page ad in conference binder
- Recognition from podium during conference
- Logo included on banner displayed on site during conference
- Opportunity to insert take away item into conference registrant “goodie bag”

**This benefit does not offer an opportunity to provide a speaker for the session*

G O L D

| | |
|------------------|-----------------------------------|
| Commitment Level | \$5,000 (unlimited) |
| Payment Terms | Full payment due with application |

Benefits

Special Benefits

- Verbal recognition as sponsor of a breakout speaker*
- Printed name on conference brochure – provided to 20,000 estate planning professionals in the United States (commitment must be received by April 30, 2010 to take advantage of this benefit)
- **Extra benefit!** Logo placement on the online publication *NAEPC Journal of Estate & Tax Planning* from the time of commitment through April 30, 2011 (www.naepcjournal.org)

Conference Participation

- Tabletop exhibition space (if desired) – *see page 11 for add'l exhibitor details*
- 3 full conference registrations

On-Site Conference Public Relations

- Full-page ad in conference binder
- Recognition from podium during conference
- Logo included on banner displayed on site during conference
- Opportunity to insert take away item into conference registrant “goodie bag”

**This benefit does not offer an opportunity to provide a speaker for the session.*

S I L V E R

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|------------------|-----------------------------------|
| Commitment Level | \$2,500 (unlimited) |
| Payment Terms | Full payment due with application |

Benefits

Conference Participation

- Tabletop exhibition space (if desired) – *see page 11 for add'l exhibitor details*
- 2 full conference registrations

On-Site Conference Public Relations

- Name included on banner displayed on site during conference

The NAEPC Foundation
1120 Chester Ave., Ste. 470 ~ Cleveland, OH 44114-3514
(866) 226-2224 ~ fax (216) 696-2582 ~ conference@naepc.org

- Half-page ad in conference binder
- Opportunity to insert take away item into conference registrant “goodie bag”

Conference Continuing Education Credit Sponsorship

Your company logo will be placed on the “information for attendees” page distributed to all continuing education credit-seeking attendees.

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| Commitment Level | \$25,000 |
| Payment Terms | \$10,000 due with commitment form Balance paid by August 2, 2010 |

Benefits

Special Benefits

- Logo on conference brochure– provided to 20,000 estate planning professionals in the United States (commitment must be received by April 30, 2010 to take advantage of this benefit)
- Only one sponsor accepted for this offering
- Right of first refusal for 2011 conference participation as the Continuing Education Credit Sponsor (commitment must be received by December 31, 2010 to take advantage of this benefit)
- Verbal recognition as the sole sponsor of a nationally recognized speaker*
- Company logo placed on “information for attendee” sheet supplied to continuing education credit seekers at conference

Conference Participation

- 8 full conference registrations
- Expanded exhibition space (if desired) – *see page 11 for add’l exhibitor details*

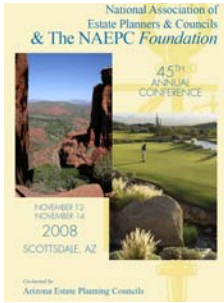
Pre-Conference Public Relations

- Listed on all NAEPC conference-related communications prior to conference
- Logo on NAEPC website with a link to company website
- *Extra benefit!* Logo placement on the online publication *NAEPC Journal of Estate & Tax Planning* from the time of commitment through April 30, 2011 (www.naepcjournal.org)

On-Site Conference Public Relations

- Full-page ad in conference binder
- Recognition from podium during conference
- Logo included on banner displayed on site during conference
- Opportunity to insert take away item into conference registrant “goodie bag”

**This benefit does not offer an opportunity to provide a speaker for the session.*



Conference Binder Sponsorship

Your company logo will be placed on the front of the conference book and compact disk distributed to all registered Council Leadership and Technical Education attendees.

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| Commitment Level | \$10,000 |
| Payment Terms | \$5,000 due with commitment form Balance paid by August 2, 2010 |

Benefits

Special Benefits

- Logo on conference brochure– provided to 20,000 estate planning professionals in the United States (commitment must be received by April 30, 2010 to take advantage of this benefit)

Conference Participation

- 2 full conference registrations
- Tabletop exhibition space (if desired) – *see page 11 for add'l exhibitor details*

Pre-Conference Public Relations

- Listed on all NAEPC conference-related communications prior to conference
- Logo on NAEPC website with a link to company website
- ***Extra benefit!*** Logo placement on the online publication *NAEPC Journal of Estate & Tax Planning* from the time of commitment through April 30, 2011 (www.naepcjournal.org)

On-Site Conference Public Relations

- Full-page ad in conference binder
- Recognition from podium during conference
- Logo included on banner displayed on site during conference
- Opportunity to insert take away item into conference registrant “goodie bag”



Name Badge Sponsorship

Your company logo will be placed on the name badge holder that is distributed to all registered attendees.

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|------------------|--|
| Commitment Level | \$10,000 |
| Payment Terms | \$5,000 due with commitment form Balance paid by August 2, 2010 |

Benefits

Special Benefits

- Logo on conference brochure– provided to 20,000 estate planning professionals in the United States (commitment must be received by April 30, 2010 to take advantage of this benefit)

Conference Participation

- 2 full conference registrations
- Tabletop exhibition space (if desired) – *see page 11 for add'l exhibitor details*

Pre-Conference Public Relations

- Listed on all NAEPC conference-related communications prior to conference
- Logo on NAEPC website with a link to company website
- ***Extra benefit!*** Logo placement on the online publication *NAEPC Journal of Estate & Tax Planning* from the time of commitment through April 30, 2011 (www.naepcjournal.org)

On-Site Conference Public Relations

- Full-page ad in conference binder
- Recognition from podium during conference
- Logo included on banner displayed on site during conference
- Opportunity to insert take away item into conference registrant “goodie bag”

Sponsored Daily Delivery of the Wall Street Journal

Your company design will be placed onto a wrap or bellyband that surrounds the *Wall Street Journal*. The publication will be delivered to all guests staying at the resort from Wednesday – Friday.

| | |
|------------------|--|
| Commitment Level | \$7,500 |
| Payment Terms | \$2,500 due with commitment form Balance paid by August 1, 2010 |

Benefits

Conference Participation

- 3 full conference registrations

On-Site Conference Public Relations

- Full-page ad in conference binder
 - Recognition from podium during conference
 - Logo included on banner displayed on site during conference
 - Opportunity to insert take away item into conference registrant “goodie bag”
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Sponsored Nightly Turn Down Service

Your company logo/design will be placed onto the box that surrounds two wonderful pieces of chocolate. The gift will be delivered to all guests staying at the resort from Wednesday – Friday.

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|------------------|--|
| Commitment Level | \$7,500 |
| Payment Terms | \$2,500 due with commitment form Balance paid by August 1, 2010 |

Benefits

Conference Participation

- 3 full conference registrations

On-Site Conference Public Relations

- Full-page ad in conference binder
- Recognition from podium during conference
- Logo included on banner displayed on site during conference
- Opportunity to insert take away item into conference registrant “goodie bag”

Sponsored Resort Key Cards

Your company logo/design will be placed onto guest room key cards for all guests staying at the resort for the conference.

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|------------------|--|
| Commitment Level | \$7,500 |
| Payment Terms | \$2,500 due with commitment form Balance paid by August 1, 2010 |

Benefits

Conference Participation

- 3 full conference registrations

On-Site Conference Public Relations

- Full-page ad in conference binder
- Recognition from podium during conference
- Logo included on banner displayed on site during conference
- Opportunity to insert take away item into conference registrant “goodie bag”

EXHIBITOR

| | |
|------------------|---|
| Commitment Level | \$1,250 Space is limited and available first come, first served with priority given to diamond, platinum, gold, silver and alternative sponsors. |
| Payment Terms | Full payment due with application |

Benefits

Conference Participation

- 1 full conference registration
Additional registrants from exhibiting company \$350
Registration sharing is not permitted
- All meals and breaks will be in exhibit area

On-Site Conference Public Relations

- Half-page ad in conference binder

Basic Exhibitor Information

Show Hours (during meal and break periods). A specific schedule will be released in the sponsor/exhibitor kit.

- Wednesday, November 17, 2010 ~ 12:00 noon – 7:00 pm
A Welcome Reception will take place within the exhibit hall on Wednesday, November 17, 2010 from 5:00 pm – 7:00 pm.
- Thursday, November 18, 2010 ~ 7:30 am – 5:00 pm
- Friday, November 19, 2010 ~ 7:30 am – 3:00 pm
*All exhibitors must be set up by 11:30 am on Wed., November 17, 2010.

On-Site Accommodations

- One 6 ft. skirted table
- One chair per registrant
- Wastebasket
- Identification sign
- Fully carpeted

Display Guidelines

- Due to space limitations, only tabletop displays will be permitted (with the exception of diamond, platinum and continuing education credit sponsors). This policy is strictly enforced.

National Association of *Estate Planners & Councils* ~ 47th Annual Conference

SPONSOR / EXHIBITOR COMMITMENT FORM

Please check your desired level of support...

| Commitment Level | Amount | Exhibit Space |
|---|---------------|----------------------|
| Diamond Sponsor Will you provide the "goodie bag" for attendees? | \$25,000 | Yes / No Yes / No |
| Continuing Education Credit Sponsor | \$25,000 | Yes / No |
| Platinum Sponsor | \$10,000 | Yes / No |
| Gold Sponsor | \$5,000 | Yes / No |
| Silver Sponsor | \$2,500 | Yes / No |
| Conference Binder Sponsorship | \$10,000 | Yes / No |
| Name Badge Sponsorship | \$10,000 | Yes / No |
| Daily Delivery of the <i>Wall Street Journal</i> Sponsorship | \$7,500 | NA |
| Daily Turn Down Service Sponsorship | \$7,500 | NA |
| Resort Key Card Sponsorship | \$7,500 | NA |
| Exhibitor | \$1,250 | Yes |

Company Contact Information (please print clearly)

COMPANY NAME EXACTLY AS IT SHOULD APPEAR ON ALL CONFERENCE MATERIAL

Contact Name _____
 Telephone # _____ E-Mail _____ Fax # _____
 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 one):

- Accounting Financial Planning Life Settlements
- Banking Insurance Trust Services
- Business Valuation Law Other: _____

Promotional Item Contact Information

Company Name _____
 Contact Name _____
 Telephone # _____ E-Mail _____ Fax # _____
 Address _____
 City, State & Zip Code _____

\$ _____ check payable to "The NAEPC Foundation" enclosed, please invoice us for the balance*
**Only diamond, platinum and select alternative sponsorship payments can be deferred.*

OR

Bill credit card number _____ Exp. Date _____
 Amount _____ Name as it appears on card _____

Signature _____

National Association of Estate Planners & Councils

Sponsor & Exhibitor Rules and Regulations

1. 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/The NAEPC Foundation, 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.

2. Assignment of Exhibit Space ~

Assignment of space will be determined by the NAEPC. The Association has the right to rearrange the floorplan in the event of conflicts.

3. Cancellation Policy ~

All Sponsor / Exhibitor commitments are non-refundable.

4. 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.

5. 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.

6. Dismantling ~

No booth may be dismantled until the time noted within the final sponsor/exhibitor kit. Any exhibitor that begins dismantling before this time will revoke their rights to exhibit at any future NAEPC/The NAEPC Foundation Conference.

7. Distribution of Printed Matter ~

Except from within rented space, exhibitors and sponsors shall not distribute printed matter, samples, souvenirs, and the like. Distribution of materials elsewhere in the exhibit hall or in the hotel is not permitted.

8. Functions ~

All functions scheduled by a Sponsor / Exhibitor during conference dates must be submitted in writing and pre-approved by the NAEPC/The NAEPC Foundation no less than 30 days prior to the start of the conference. This includes, but is not limited to, receptions, dinners, breakfasts, hospitality suites or alternative transportation to off-site conference related events. Any Sponsor / Exhibitor deemed to have scheduled a competing event will revoke their right to participate in future NAEPC/The NAEPC Foundation conferences. Pre-paid Sponsor / Exhibitor fees will NOT be refunded.

9. Insurance & Liability ~

Sponsor / Exhibitor assumes entire responsibility and hereby agrees to protect, indemnify, defend, and save the National Association of Estate Planners & Councils/The NAEPC Foundation 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, excluding any such liability caused by the sole negligence of National Association of Estate Planners & Councils/The NAEPC Foundation and its employees and Board of Directors.

10. Mailing List ~

Sponsors / Exhibitors are entitled to one electronic set of mailing labels of registered attendees one month prior to the start of the conference. These labels are provided for the sole purpose of contacting attendees prior to the meeting. Reproduction of these labels is strictly prohibited.

11. Programming ~

Sponsors / Exhibitors may not conduct promotional educational programming including lectures, demonstrations or audiovisual presentations during Conference programming hours.

12. 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.

13. 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 e-mail.

14. Staffing ~

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

15. 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 /The NAEPC Foundation in advance.

