

The NAEPC Foundation *and*  
National Association of Estate Planners & Councils  
48<sup>th</sup> Annual Conference★

---

SPONSOR & EXHIBITOR PACKAGE 2011

November 16 – 18, 2011

San Antonio, *Texas*

San Antonio Marriott Rivercenter



*The Association of Choice for Estate Planning Professionals*

The NAEPC Education Foundation  
1120 Chester Ave., Ste. 470 ~ Cleveland, OH 44114-3514  
Direct questions/inquiries about this event to Jim McCambridge at [jim@ianryan.com](mailto:jim@ianryan.com) / 847-212-4294  
(866) 226-2224 ~ fax (216) 696-2582 ~ [conference@naepc.org](mailto:conference@naepc.org)

## **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. By supporting this conference, you are reaching far beyond the benefits associated with the event and are truly helping to fulfill the mission of The NAEPC Foundation.

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. Its 220+ affiliated estate planning councils and their 25,000+ members are 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 supports the team approach to estate planning and assists The NAEPC Foundation in helping to spread awareness and understanding of the need for estate planning by a qualified team of professionals.

Visit [www.naepc.org](http://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 16, 2011 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. Additional attendees will join for the technical education portion of the event with total attendance anticipated to reach 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 planned giving professionals from across the country.

The San Antonio Marriott Rivercenter, located on the famed Riverwalk, is a magnificent property conveniently located near many great activities, including shopping at the Rivercenter Mall connected to the hotel, on-site dining and entertainment and the cultural and historical landmarks of San Antonio such as the world famous Alamo.

## **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 16, 2011 and teardown will take place during the afternoon of Friday, November 18, 2011. 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 16, 2011. Attendees from sponsoring / exhibiting companies are encouraged to attend all conference related events including the social event scheduled for the evening of Thursday, November 17, 2011 and the volunteer activity scheduled on Saturday, November 19, 2011.

# DIAMOND

Commitment Level                    \$25,000 (one per industry noted below)

Payment Terms                        \$10,000 due with commitment form  
Balance paid by August 5, 2011

## 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 2012 conference participation at the Diamond Level (commitment must be received by December 31, 2011 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 29, 2011 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, 2012 ([www.naepcjournal.org](http://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

Commitment Level	\$10,000 (unlimited per industry)
Payment Terms	\$5,000 due with commitment form Balance paid by August 5, 2011

## 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 29, 2011 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, 2012 ([www.naepcjournal.org](http://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 commitment form

## 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 29, 2011 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, 2012 ([www.naepcjournal.org](http://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

Commitment Level	\$2,500 (unlimited)
Payment Terms	Full payment due with commitment form

## 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

- Printed name included on banner displayed on site during conference
- 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.

Commitment Level	\$25,000
Payment Terms	\$10,000 due with commitment form Balance paid by August 5, 2011

**Benefits**

**Special Benefits**

- Logo on conference brochure– provided to 20,000 estate planning professionals in the United States (commitment must be received by April 29, 2011 to take advantage of this benefit)
- Only one sponsor accepted for this offering
- Right of first refusal for 2012 conference participation as the Continuing Education Credit Sponsor (commitment must be received by December 31, 2011 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, 2012 ([www.naepcjournal.org](http://www.naepcjournal.org))

**On-Site Conference Public Relations**

- Full-page ad in conference binder
- Continual 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.

Commitment Level	\$10,000
Payment Terms	\$5,000 due with commitment form Balance paid by August 5, 2011

## 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, 2011 to take advantage of this benefit)
- Only one sponsor accepted for this offering

### Conference Participation

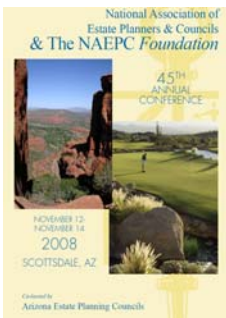
- 2 full conference registrations
- Tabletop exhibition space (if desired) – *see page 11 for add'l exhibitor details*

### 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, 2012 (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”



The NAEPC Education Foundation

1120 Chester Ave., Ste. 470 ~ Cleveland, OH 44114-3514

Direct questions/inquiries about this event to Jim McCambridge at [jim@ianryan.com](mailto:jim@ianryan.com) / 847-212-4294  
(866) 226-2224 ~ fax (216) 696-2582 ~ [conference@naepc.org](mailto:conference@naepc.org)



### **Name Badge Sponsorship**

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

Commitment Level	\$10,000
Payment Terms	\$5,000 due with commitment form Balance paid by August 5, 2011

### **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, 2011 to take advantage of this benefit)
- Only one sponsor accepted for this offering

#### **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, 2012 ([www.naepcjournal.org](http://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 5, 2011

**Benefits**

**Special Benefits**

- Only one sponsor accepted for this offering

**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 Nightly Turn Down Service**

Your company logo/design will be placed onto the box that surrounds two wonderful pieces of chocolate. Your gift 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 5, 2011

**Benefits**

**Special Benefits**

- Only one sponsor accepted for this offering

**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.

Commitment Level	\$7,500
Payment Terms	\$2,500 due with commitment form Balance paid by August 5, 2011

**Benefits**

**Special Benefits**

- Only one sponsor accepted for this offering

**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 commitment form

## Benefits

### Conference Participation

- 1 full conference registration  
Additional registrants from exhibiting company \$400  
**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 16, 2011 ~ 12:00 noon – 7:00 pm  
A Welcome Reception will take place within the exhibit hall on Wednesday, November 16, 2011 from 5:00 pm – 7:00 pm.
  - Thursday, November 17, 2011 ~ 7:30 am – 5:00 pm
  - Friday, November 18, 2011 ~ 7:30 am – 3:00 pm
- \*All exhibitors must be set up by 11:30 am on Wed., November 16, 2011

### 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.

The NAEPC Foundation ~ 48<sup>th</sup> Annual Conference**SPONSOR / EXHIBITOR COMMITMENT FORM**

Please  
check  
your  
desired  
level of  
support...

Commitment Level	Amount	Exhibit Space
Diamond Sponsor	\$25,000	Yes / No
Will you provide the "goodie bag" for attendees?		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)

**PLEASE PRINT COMPANY NAME EXACTLY AS IT SHOULD APPEAR  
ON ALL CONFERENCE MATERIAL**

Contact Name \_\_\_\_\_  
 Telephone # \_\_\_\_\_ E-Mail \_\_\_\_\_  
 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                       Financial Planning                       Life Settlements  
 Banking                               Insurance                                       Trust Services  
 Business Valuation                       Law     Other: \_\_\_\_\_

Promotional Item Contact Information

Company Name \_\_\_\_\_  
 Contact Name \_\_\_\_\_  
 Telephone # \_\_\_\_\_ E-Mail \_\_\_\_\_  
 Address \_\_\_\_\_  
 City, State & Zip Code \_\_\_\_\_

\$ \_\_\_\_\_ check payable to "The NAEPC Foundation"  
 \* diamond, platinum and select alternative sponsorship payments may be deferred.

**OR**

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

Signature \_\_\_\_\_

# The NAEPC Foundation / NAEPC

## *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 right 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, general or breakout session space, in the hotel or on hotel property 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, 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 a list of registered attendees one month prior to the start of the conference. The electronic file is provided for the sole purpose of contacting attendees in advance of the event to promote your attendance. The list is provided for one-time use and may not be duplicated or entered into a database.

## ***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.

