

## SPONSOR & EXHIBITOR PACKAGE

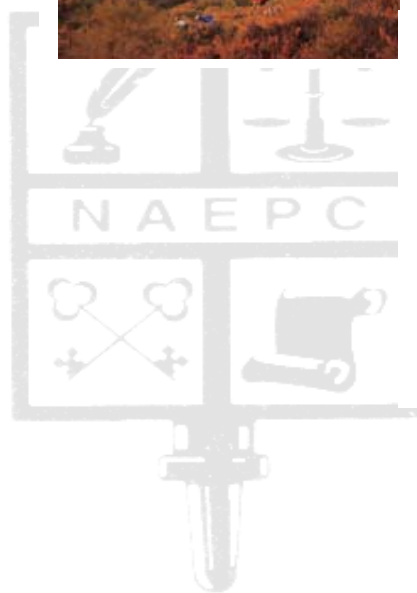
# 45<sup>th</sup> Annual Conference

of the National Association of *Estate Planners & Councils* &  
National Association of *Estate Planners & Councils* Foundation

November 12 –  
November 14, 2008

*Scottsdale, Arizona*

**Doubletree Paradise  
Valley Resort**



Co-hosted by the  
**Central Arizona Estate Planning Council**

National Association of Estate Planners & Councils  
1120 Chester Ave., Ste. 470 ~ Cleveland, OH 44114-3514  
(866) 226-2224 ~ fax (216) 696-2582 ~ [conference@naepc.org](mailto:conference@naepc.org)

## NAEPC INFORMATION

The National Association of Estate Planners & Councils (NAEPC) is a national organization of 1200 Accredited Estate Planners (AEP's) and 180+ affiliated Estate Planning Councils with approximately 23,000 members 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 by involving cross-professional disciplines to better serve the public's need. Visit [www.naepc.org](http://www.naepc.org) for more information.

## GENERAL CONFERENCE & LOCATION INFORMATION

The 3-day conference program features one day devoted solely to affiliated local council leadership development. As such, the Wednesday, November 12, 2008 schedule is geared toward information for leaders from the 180+ affiliated councils throughout the country. Approximately 110 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.

*Discover the desert you never knew!*

The **Doubletree Paradise Valley Resort** offers luxury, resort amenities, and visually stunning Sonoran Desert views on 22 acres of lush, tropical paradise, just minutes from historic Old Town Scottsdale and Arizona State University. The property is located just 12 miles from Phoenix Sky Harbor International Airport.

In Greater Phoenix, you'll find everything from world-class resorts and fine dining to exhilarating adventure, breath-taking golf courses, trendy shopping, modern nightlife and enriching culture. The city is also proud host to Super Bowl XLII on February 3, 2008!

## GENERAL SPONSOR / EXHIBITOR INFORMATION

Sponsorship & Exhibitor arrangements cannot be confirmed until the NAEPC office receives an executed Commitment Form (page 7 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 8 and 9 of this document.

Conference attendee 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 12, 2008 and teardown will take place after the afternoon break on Friday, November 14, 2008. 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 12, 2008. Attendees from Sponsoring / Exhibiting companies are encouraged to attend all conference related events including the social event scheduled for the evening of Thursday, November 13, 2008.

# DIAMOND

Commitment Level	\$25,000 (one per industry noted below)
Payment Terms	\$10,000 due with Commitment Form Balance paid by August 1, 2008

## Benefits

### Special Benefits

- Exclusive for your 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 2009 conference participation at the Diamond Level
- Noted as sponsor of Thursday evening Social Event, signage present onsite, six additional tickets to the Social Event
- Sole sponsor of nationally recognized speaker
- Logo on Conference brochure– provided to 20,000 estate planning professionals in the United States
- Opportunity to provide the Conference “goodie bag”

### Conference Participation

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

### Pre-Conference Public Relations

- Listed on all NAEPC Conference-related communications prior to event
- 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 “goodie bag”

# PLATINUM

Commitment Level	\$10,000 (unlimited per industry)
Payment Terms	\$5,000 due with Commitment Form Balance paid by August 1, 2008

## Benefits

### Special Benefits

- Sole sponsor of a nationally recognized speaker
- Logo on Conference brochure– provided to 20,000 estate planning professionals in the United States

### Conference Participation

- Expanded exhibition space (if desired) – *see page 6 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

### 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 “goodie bag”

# G O L D

Commitment Level	\$5,000 (unlimited)
Payment Terms	\$2,500 due with Commitment Form Balance paid by August 1, 2008

## Benefits

### Special Benefits

- Sponsor of a breakout speaker
- Printed name on Conference brochure – provided to 20,000 estate planning professionals in the United States

### Conference Participation

- Tabletop Exhibition space (if desired) – *see page 6 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 “goodie bag”

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# S I L V E R

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

## Benefits

### Conference Participation

- Tabletop Exhibition space (if desired) – *see page 6 for add'l exhibitor details*
- 2 full Conference registrations

### On-Site Conference Public Relations

- Full-page ad in Conference binder
- Name included on banner displayed on site during Conference
- Opportunity to insert take away item into Conference “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, 2008

**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 “goodie bag”

**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.

Commitment Level	\$7,500
Payment Terms	\$2,500 due with Commitment Form Balance paid by August 1, 2008

**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 “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 1, 2008

**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 “goodie bag”

# EXHIBITOR

Commitment Level	\$1,000 Space is limited and available first come, first served with priority given to Diamond, Platinum, Gold & Silver sponsors.
Payment Terms	Full payment due with application

## Benefits

### Conference Participation

- 1 full conference registration  
Additional registrants from exhibiting company \$300  
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
- Opportunity to insert take away item into Conference “goodie bag”

## Basic Exhibitor Information

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

- Wednesday, November 12, 2008 ~ 12:00 noon – 7:30 pm  
A Welcome Reception will take place within the exhibit hall on Wednesday, November 12, 2008 from 5:00 pm – 7:00 pm.
- Thursday, November 13, 2008 ~ 7:30 am – 5:00 pm
- Friday, November 14, 2008 ~ 7:30 am – 3:00 pm  
\*All exhibitors must be set up by 11:30 am on Wed., November 12, 2008.

### 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 Sponsors).

National Association of Estate Planners & Councils ~ 45<sup>th</sup> 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
Platinum Sponsor	\$10,000	Yes / No
Gold Sponsor	\$5,000	Yes / No
Silver Sponsor	\$2,500	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	\$1,000	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 on pages 8 and 9 of 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 \_\_\_\_\_

Payment Information

\$ \_\_\_\_\_ enclosed, please invoice us for the balance\*  
 \*Only Diamond, Platinum and Gold 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*

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### **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/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/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 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/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/National Association of Estate Planners & Councils 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/National Association of Estate Planners & Councils 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 in advance.

