

National Association of Estate Planners & Councils  
& The NAEPC Education Foundation

# *51<sup>st</sup> Annual Conference*



**SPONSOR &  
EXHIBITOR  
PROSPECTUS**

**NOVEMBER 5 - 7, 2014  
SAN ANTONIO, TX  
MARRIOTT RIVERCENTER**





Beginning in 2014, we are excited to offer an enhanced strategic/streamlined approach to sponsor and exhibitor opportunities that combine our most popular past offerings with new benefits never offered. We've taken the best from past experiences and incorporated additional perks to ensure success with your marketing dollars, which we believe will yield the highest return on your investment. The matrix below offers an overview of preferred and exhibitor opportunities available.

**TWO-YEAR COMMITMENTS\*  
ARE NOW AVAILABLE AND OFFER A  
15% DISCOUNT!**

	<b>PREMIER</b>	<b>PARTNER</b>	<b>ASSOCIATE</b>	<b>EXHIBITOR PLUS</b>	<b>EXHIBITOR</b>
	\$17,500	\$12,500	\$7,500	\$5,000	\$2,150
With Your 2-Year Commitment (Cost per Year)	\$14,875	\$10,625	\$6,375	\$4,450	\$1825
Included Registrations	6	5	4	3	2
Discipline Exclusivity	•				
Right of First Refusal for Upcoming Conference	•				
Airline Reimbursement for Two	•				
Invitation to Attend the Awards Ceremony Private Breakfast	•				
Sponsor of Welcome Reception	•				
Complimentary Speaker Introduction, General Session	•				
Complimentary Bonus Session	•				
General Session Visual Recognition During Attendee Arrival	•	•			
Expanded Exhibition Table	•	•			
Logo in Association Newsletter for Year of Support	•	•			
Overnight Accommodation Reimbursement for Two Rooms, Two Nights	•	•			
Logo on Cover of Registrant Binder	•	•	•		
Premium Exhibit Booth Placement	•	•	•		
Logo on Attendee Welcome Bag	•	•	•		
Verbal Recognition from Podium	•	•	•		
Logo Placement on NAEPC Journal of Estate & Tax Planning with Link	•	•	•	•	
Pre- and Post-conference Attendee Mailing List	•	•	•	•	•
Insert Item into Attendee Welcome Bag	•	•	•	•	•
Optional Speaker Introduction (Fee Applies)		•	•	•	•
Optional Sponsor Bonus Session (Fee Applies)		•	•	•	
Logo on Conference Banner Signage	•	•	•	name	
Recognition in Conference Messages to Attendees	logo	logo	name	name	
Ad in Registrant Binder	full page	full page	full page	half page	half page

*\*Two-year commitment must be consecutive. See page 13 for additional information.*

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

# • PREMIER

# \$17,500

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

Accounting  
Appraisal

Banking / Trust Services  
Financial Planning

Insurance  
Legal

*Benefits include:*

- 6 full conference registrations
- Company logo in the NAEPC newsletter, *NAEPC News*, for the entire calendar year of conference support from the time of commitment
- Logo and link placement on the *NAEPC Journal of Estate & Tax Planning*, the association's well-read online resource for professionals, for the entire calendar year of conference support from the time of commitment
- 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
- Standard coach airfare reimbursement for 2 company representatives to travel to and from the 51<sup>st</sup> Annual 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 51<sup>st</sup> Annual hosting property, Marriott Rivercenter
- Right of first refusal for the 52<sup>nd</sup> Annual Conference if commitment is received on or before December 31, 2014

*While attending the conference, Premier Sponsors 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 7 of this document
- The most prominent company logo on all conference banner 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 binder each educational registrant receives upon check-in
- Noted as the sponsor of the Wednesday, November 5, 2014 Welcome Reception in the Exhibit Hall
- Ability to offer a two-minute speaker introduction of a nationally-known general session speaker
- Opportunity to provide a complimentary Bonus Session for conference attendees (application required at the time commitment form is received)
- Invitation for company representatives to attend the private NAEPC Board of Directors Awards Breakfast on Friday, November 7, 2014
- Full-page ad in the registrant binder
- Logo placement on the attendee welcome bag
- Company insert in the attendee welcome bag

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1120 Chester Ave., Ste. 470 • Cleveland, OH 44114 • (866) 226-2224 • fax (216) 696-2582 • [conference@naepc.org](mailto:conference@naepc.org)

# • PARTNER

# \$12,500

*Benefits include:*

- 5 full conference registrations
- Company logo in the NAEPC newsletter, *NAEPC News*, for the entire calendar year of conference support from the time of commitment
- Logo and link placement on the *NAEPC Journal of Estate & Tax Planning*, the association's well-read online resource for professionals, for the entire calendar year of conference support from the time of commitment
- 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
- Reimbursement of two nights of standard lodging (room & tax charges only) for two company representatives at the 51<sup>st</sup> Annual hosting property, Marriott Rivercenter

*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 7 of this document
- Company logo on all conference banner 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 binder each educational registrant receives upon check-in
- Full-page ad in the registrant binder
- Logo placement on the attendee welcome bag
- Company insert in the attendee welcome bag

*To enhance the value of participation, Partners 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 (fee applies)
- Offer a Sponsor Bonus Session (fee applies, see below)

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



By opting in, you are able to host a *Sponsor Bonus Session* on either Thursday or Friday morning. See page 8 for additional details!

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

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

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# • ASSOCIATE

# \$7,500

*Benefits include:*

- 4 full conference registrations
- Logo and link placement on the *NAEPC Journal of Estate & Tax Planning*, the association's well-read online resource for professionals, for the entire calendar year of conference support from the time of commitment
- 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

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

- Standard exhibition table with noticeable placement – Additional exhibitor information can be found on page 7 of this document
- Company logo on all conference banner signage
- Verbal recognition daily from the podium
- Company logo placed on the cover of the binder each educational registrant receives upon check-in
- Full-page ad in the registrant binder
- 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 (fee applies)
- Offer a Sponsor Bonus Session (fee applies, see below)

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



By opting in, you are able to host a *Sponsor Bonus Session* on either Thursday or Friday morning. See page 8 for additional details!

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

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

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# • EXHIBITOR PLUS \$5,000

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*Benefits include:*

- 3 full conference registrations
- Logo and link placement on the *NAEPC Journal of Estate & Tax Planning*, the association's well-read online resource for professionals, for the entire calendar year of conference support from the time of commitment
- 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

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

- Standard exhibition table – Additional exhibitor information can be found on page 7 of this document
- Company name on all conference signage
- Full-page ad in the registrant binder
- Company insert in the attendee welcome bag

*To enhance the value of participation, Exhibitor Plus Sponsors 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 (fee applies)
- Offer a Sponsor Bonus Session (fee applies, see below)

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



By opting in, you are able to host a *Sponsor Bonus Session* on either Thursday or Friday morning. See page 8 for additional details!

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

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

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# • EXHIBITOR

# \$2,150

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## *Benefits include:*

- 2 full conference registrations (additional representatives may be registered, a \$350 per person fee applies)
- 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

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

- Standard exhibition table
- Half-page ad in the registrant binder
- 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 (fee applies)

## GENERAL EXHIBITION INFORMATION •

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### *Shipping & Receiving*

All sponsors and exhibitors will be asked to ship their materials directly to the hotel, NAEPC does not use an exhibition company.

### *Set Up & Tear Down*

Set up: Wednesday, November 5, 2014 from 7:30 am – 11:30 am

Tear down: Immediately following lunch on Friday, November 7, 2014

### *Booth Assignments*

All exhibitor booth assignments are handled internally.

### *Hall Hours*

The 51<sup>st</sup> Annual Conference Exhibit Hall will be open during meal and break periods beginning with lunch on Wednesday, November 5, 2014, concluding after lunch on Friday, November 7, 2014. The Wednesday, November 5, 2014 Welcome Reception will take place in the Exhibit Hall and offers an excellent opportunity to spend quality time with the conference attendees. All meals and breaks are served within the exhibit hall from set up to tear down. A final schedule of events will be published in the full conference brochure.

### *On-Site*

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

### *Display Guidelines*

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

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## SPONSOR BONUS SESSION INFORMATION

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**Sponsor Bonus Sessions are provided as a way for those organizations supporting the annual conference\* to enrich the educational experience of the 51<sup>st</sup> Annual Conference.**

*When are the sessions offered?*

These special sessions will be offered from 7:00 am – 7:50 am on the mornings of both Thursday, November 6, 2014 and Friday, November 7, 2014 (4 available, 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, and must submit a complete application (page 10 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 1, 2014 will have information about their Sponsor Bonus Session included in the hard-copy registration brochure. Please note that the materials will clearly indicate that the program is a Sponsor Bonus Session and will include notice of which company sponsored the session.

*What will NAEPC provide for our session?*

- NAEPC will provide standard audio-visual equipment for the session (podium, microphone, screen, and projector). Speakers must provide their own laptop and audio-visual support will be available to assist with set up (if necessary). 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.

*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 1, 2014 will be promoted to the best of NAEPC's abilities online and in print.

Partner, Associate, and Exhibitor Plus Sponsors are eligible to opt-in to hosting a Sponsor Bonus Session. Premier Sponsors are offered a session on a complimentary basis.

**All Sponsor Bonus Session sponsors are given first right of refusal to host a session the following year with priority offered to Premier Sponsors.**



# 51<sup>ST</sup> ANNUAL CONFERENCE SPONSOR / EXHIBITOR COMMITMENT FORM ·

*Step 1; choose your level of support...*

	Commitment Level	Amount	Exhibition Space	Host Bonus Session? (application req'd, pg 10)
<input type="checkbox"/>	Premier Sponsor	\$17,500	yes / no	yes / no
<input type="checkbox"/>	Partner Sponsor	\$12,500	yes / no	yes (fee required)
<input type="checkbox"/>	Associate Sponsor	\$7,500	yes / no	yes (fee required)
<input type="checkbox"/>	Exhibitor Plus Sponsor	\$5,000	yes / no	yes (fee required)
<input type="checkbox"/>	Exhibitor	\$2,150	yes	n/a

\_\_ Yes, we want to take advantage of the 15% discount and are committing to two consecutive years of support!

*Step 2; please tell us about your company...*

**How should your company name appear in our materials?**

→ \_\_\_\_\_

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):

- |   |   |  |
|---|---|--|
| <input type="checkbox"/> Accounting               | <input type="checkbox"/> Financial Planning | <input type="checkbox"/> Software                |
| <input type="checkbox"/> Appraisal                | <input type="checkbox"/> Insurance          | <input type="checkbox"/> Other (please describe) |
| <input type="checkbox"/> Banking / Trust Services | <input type="checkbox"/> Legal              | _____  |
| <input type="checkbox"/> Business Valuation       | <input type="checkbox"/> Life Settlements   |  |

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; please provide payment details...*

Enclosed is our \$ \_\_\_\_\_ check payable to “The NAEPC Education Foundation”

*or*

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

Signature \_\_\_\_\_

# SPONSOR BONUS SESSION 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 session below taking special care to note that the **information you include will be published in the annual conference registration materials**, if program is accepted.

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

Speaker Full Name & Professional  
Designations\* \_\_\_\_\_  
*\*please attach a biography for the speaker*

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

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 come/first served 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 \_\_\_\_\_  
\_\_\_\_\_

By signing below I/we agree to comply with the rules & regulations outlined within the sponsorship packet and specifically for the Sponsor Bonus Session. 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 \_\_\_\_\_

## **ABOUT NAEPC & THE NAEPC EDUCATION FOUNDATION •**

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The **National Association of Estate Planners & Councils** is a national organization of 1,700+ Accredited Estate Planner® and Estate Planning Law Specialist designation holders. Its 250 affiliated estate planning councils and their estimated 28,000 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.

**The NAEPC Education 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 the 51<sup>st</sup> Annual Conference, 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 Education Foundation.

Visit [www.naepc.org](http://www.naepc.org) for more information about either organization.

## **51<sup>ST</sup> ANNUAL CONFERENCE & LOCATION INFORMATION •**

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The 3-day conference program features one day devoted solely to affiliated local estate planning council leadership development. As such, the Wednesday, November 5, 2014 schedule is geared toward information 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 again 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 planned giving professionals from across the country.

While participating in the 51<sup>st</sup> Annual Conference, we invite your representatives to experience a city unlike any other. San Antonio is a land of epic battles, flowing rivers, and a flourishing culture. From the stones of the Alamo and the meandering paths of the River Walk to Sea World San Antonio and Six Flags Fiesta Texas, San Antonio takes you on a journey through a land as grand as its reputation. Explore the rolling terrain of San Antonio's Hill Country, a lush oasis offering resorts with top-notch golf courses, spas and waterparks. So come, find for yourself that San Antonio is more than a convention destination.

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 •**

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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 12 and 13 of this document. Conference attendee postal mailing information will be released one month prior to the start of the conference and within 30 days of the conclusion of the conference, both in an electronic format for one-time sponsor / exhibitor use in contacting registered participants. Please note that email addresses are not available.

Exhibitor set-up will take place the morning of Wednesday, November 5, 2014 and teardown will take place following lunch on Friday, November 7, 2014. 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 5, 2014. Attendees from sponsoring / exhibiting companies are welcome and encouraged to attend all conference related events, including the continuing education sessions.

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# **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/The NAEPC Education 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.

## ***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.

## ***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 time noted within the final sponsor/exhibitor kit. Any exhibitor that begins dismantling before this time may revoke their right to exhibit at any future NAEPC/The NAEPC Education Foundation conference.

## ***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.

## ***Functions •***

All functions scheduled by a sponsor / exhibitor during conference dates must be submitted in writing and pre-approved by the NAEPC/The NAEPC Education Foundation 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. Any sponsor / exhibitor deemed to have scheduled a competing event may revoke their right to participate in future NAEPC/The NAEPC Education Foundation 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 National Association of Estate Planners & Councils/The NAEPC Education 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 Education Foundation 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 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.

### ***Multi-Year Commitments •***

Sponsors / exhibitors that opt into a multi-year commitment may take advantage of a 15% discount on both years of support. Full payment for the 2014 sponsorship and a deposit of 50% of the 2015 sponsorship is required with the commitment form. The remainder payment is due on or before April 1, 2015. Deposits are non-refundable.

### ***Programming •***

Sponsors / exhibitors may not conduct promotional educational programming including lectures, demonstrations or audiovisual presentations during conference programming hours with the exception of approved Sponsor Bonus 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 /The NAEPC Education Foundation in advance.

## **MAILING LIST USAGE POLICY •**

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All sponsors and exhibitors receive one pre- and one post-conference mailing list of attendee addresses for use in promoting their attendance at the annual conference. By accepting delivery of each 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 personal contact.
- NAEPC, National Association of Estate Planners & Councils, and The NAEPC Education Foundation names or logos may not be used on any material mailed by user. The sponsoring or exhibiting company may reference their attendance at the “51<sup>st</sup> Annual Conference” of NAEPC and The NAEPC Education Foundation.
- 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.
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**Direct inquiries about sponsorship opportunities to Ed Socorro**

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