

# 61st Annual NAEPC Advanced Estate Planning Strategies Conference

## EARLY BIRD SPONSOR & EXHIBITOR PROSPECTUS



October 20 - 24, 2024  
Disneyland Hotel  
Anaheim, CA



Join  
**LEADERS** in  
the **ESTATE  
PLANNING**  
COMMUNITY.

## Sponsorship Opportunities At-a-Glance

## Attention Grabbers & Corporate Sponsorships Available

	Marquee	Premier	Enhanced Partner Your Way	Partner Your Way
Regular	\$46,750	\$30,250	\$12,650	\$6,050
By 01/31/24 (2023 Supporters)	\$42,075	\$27,225	\$11,385	\$5,445
By 01/31/24 (New Supporters)	\$44,410	\$28,735	\$12,015	\$5,750
Discipline Exclusivity	shared with Premier	shared with Marquee		
Right of First Refusal for 2025 at Current Level of Support (by 12/31/24)	x	x		
Conference Registrations	8	6	3	2
"Ask the Expert" Station	x			
General Session Presentation (one per day accepted)	x	x		
2-Minute Video on NAEPC Website Conference Page with One Share in NAEPCs LinkedIn Group	x	x	available	
Complimentary Under-Door Delivery	x			
Educational Webinar for NAEPC Members During 2024 (limit three)	choice of one, one hour program or two, thirty-minute programs	one, one hour program		
Exhibitor Bingo & Opportunity to Contribute Prize	x	x	available	available
Expanded Exhibition Space	x	x	available (10 ft)	
Preferred Exhibit Hall Placement	x	x	available	available
Keycard Sponsorship	x			
Lanyard Sponsorship	x			
Logo / Link on NAEPC News & NAEPC Journal of Estate & Tax Planning through 12/31/24	x	x	available	available
Logo / Link on NAEPC Website Conference Page	x	x	available	available
Logo / Link on All Conference Email & Confirmation Messages	x	x	available	available
Logo on CE/Materials Hub and Paper Attendance Tracking Forms	x			
Logo on Conference Signage	x	x	x	x
Logo on Council Leadership Conference Signage & Verbal Recognition during Learning Pods	x	x		
Placement in Materials Hub Sponsor Listing	x	x	x	x
Overnight Accommodations / Standard Room, Host Hotel	six nights	four nights	three nights available	
Pre- and Post-Conference Attendee List	with email	with email	postal mail - add email addresses available	postal mail - add email addresses available
President's Reception	sponsorship & invitation for eight	sponsorship & invitation for six	tickets to attend available	
Reception Sponsorship	Sunday and Tuesday	Sunday or Tuesday (assigned internally)		
Two-Minute Speaker Introduction	general session	general session	general session available	general or breakout session available
Verbal Appreciation from Podium	x	x		
30-Minute Bonus Workshop (7 am)			available	additional fee
Attention Grabber Discount	10%	10%	10%	10%

## Exhibit Booth

Regular: \$2,750

By 01/31/24 (2023 Supporters): \$2,475

By 01/31/24 (New Supporters): \$2,612

Includes one registration and a pre- and post-conference mailing list including postal mailing addresses.

Direct inquiries about sponsorship to  
Ed Socorro @ 312-600-5303  
or [sponsorship@naepc.org](mailto:sponsorship@naepc.org).

NAEPC National Office  
2001 Crocker Rd., Ste. 510  
Westlake, OH 44145  
866-226-2224 | [conference@naepc.org](mailto:conference@naepc.org)

# Your Commitment

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## Step #1, Choose your Level of Support

	Marquee	Premier	Enhanced Partner Your Way	Partner Your Way	Exhibitor
Regular	\$46,750	\$30,250	\$12,650	\$6,050	\$2,750
By 01/31/24 (2023 Supporters)	\$42,075	\$27,225	\$11,385	\$5,445	\$2,475
By 01/31/24 (New Supporters)	\$44,410	\$28,735	\$12,015	\$5,750	\$2,612
Make your Selection Here				Workshop? Y N (Add'l \$3,900 Fee)	

\*Additional paperwork and materials related to the educational session will be required from Marquee and Premier sponsors on or before January 31, 2024. Those "Your Way" sponsors that request a bonus workshop will also be required to submit paperwork and materials related to their session on or before January 31, 2024.

## Step #2, Your Firm's Details

### HOW SHOULD YOUR COMPANY NAME APPEAR IN OUR MATERIALS?

\*Please be exact and make sure the text is legible. This information is used in our materials.

What is your firm's primary discipline or specialty (check all that apply)

☐ Accounting ☐ Appraisal ☐ Banking/Trust ☐ Financial Planning ☐ Insurance ☐ Legal ☐ Life Settlements ☐ Software ☐ Valuation  
☐ Other (please describe) \_\_\_\_\_

### Contacts & Other Important Details

Website Address \_\_\_\_\_

Primary Contact's Name \_\_\_\_\_

Primary Contact's Telephone \_\_\_\_\_ Primary Contact's Email \_\_\_\_\_

Address \_\_\_\_\_ City, State, Zip Code \_\_\_\_\_

Primary Contact's Signature \_\_\_\_\_

\*By signing above, I/we agree that we will comply with all rules and regulations contained within the prospectus, which will be distributed at a later date.

Additional / Marketing Contact (This person will be copied on all pre-conference details and communication, including the logistics kit that provides information on set-up, hall hours, shipping, attendee request, etc. If none, please leave blank.)

Marketing Contact's Name \_\_\_\_\_

Marketing Contact's Telephone \_\_\_\_\_ Marketing Contact's Email \_\_\_\_\_

Address \_\_\_\_\_ City, State, Zip Code \_\_\_\_\_

## Step #3, Payment

Payment  
required with  
commitment.

Please retain a  
copy of this form  
as your receipt.

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

Bill Credit Card Number \_\_\_\_\_ Exp. Date \_\_\_\_\_

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

Zip Code Associated with Credit Card \_\_\_\_\_

Signature \_\_\_\_\_

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