



60th Annual



NAEPC Advanced Estate Planning Strategies Conference

SPONSOR & EXHIBITOR PROSPECTUS

NEW
SCHEDULE

November 12 - 16, 2023
Fort Lauderdale, Florida



THE ROADMAP

What You'll Find and Where

Matrix of Opportunities.....	2
Diamond Anniversary Sponsorship.....	3
Premier Sponsorship.....	4
Continuing Education Sponsorship.....	5
<i>Enhanced</i> Partner Your Way Sponsorship.....	6
Partner Your Way Sponsorship.....	7
Exhibitor.....	7
Corporate Support.....	8
Attention Grabbers.....	8
Exhibit Hall Basics.....	9
About the National Association of Estate Planners & Councils.....	9
Conference General Information.....	9
Commitment Form.....	10
Mail List Usage Policy.....	11
Rules & Regulations.....	11
General Session FAQ.....	13
Bonus Workshop FAQ.....	14
Application for Session & Webinar Approval.....	15
Social Events.....	16



SUPPORT OPPORTUNITIES

	Available until April 30, 2023 60 th Anniversary DIAMOND SPONSORSHIP	PREMIER SPONSORSHIP	CONTINUING EDUCATION SPONSORSHIP	ENHANCED PARTNER YOUR WAY SPONSORSHIP	PARTNER YOUR WAY SPONSORSHIP	EXHIBITOR
Cost of Entry	\$42,500	\$27,500	\$17,500	\$11,500	\$5,500	\$2,750
Conference Registrations for Representatives or Gifts	8	5	4	3	2	1
Discipline Exclusivity		✓				
Right of First Refusal for 2024		✓	✓			
General Session Presentation (<i>limit three</i>)	✓	✓				
Anniversary-Exclusive Benefits	lanyard, keycard, departure snack station, under-door delivery, "Ask the Expert" session					
President's Reception	sponsorship & Invitation for 8	sponsorship & Invitation for 5	invitation for 4			
Exhibit Hall Bingo Card Placement & Opportunity to Contribute Prize	✓	✓	✓			
Present Educational Webinar for NAEPC Members During 2023 (<i>limit three</i>)	✓	✓				
Two-Minute Speaker Introduction	✓	✓	✓			
Attendee Reception Sponsorship	both	one	one			
Overnight Accommodations	six nights	four nights	three nights			
Preferred Exhibit Hall Placement	✓	✓	✓			
Expanded Exhibition Space	✓	✓	✓			
Logo on CE Hub, Instructions, Paper Check-In / Out Vouchers, and Email Containing Certificate			✓			
Logo / Link on <i>NAEPC Journal of Estate & Tax Planning</i> and <i>NAEPC News</i> through 2023	✓	✓	✓			
Logo / Link on Conference and Event FAQ Webpages and Registration Page	✓	✓	✓			
2-Minute Firm-Provided Video on Conference Webpage with One Share in NAEPCs LinkedIn Group	✓	✓	✓			
Logo on Conference Signage	top billing	✓	✓			
Logo on Council Leadership Day Signage + Recognition During Learning Pods	✓	✓				
Attendee Bag	logo & insert	logo	logo			
Verbal Appreciation from Podium	✓	✓	✓			
Pre- and Post-Conference Attendee List	with email	with email	with email		opt-in	postal only
Bonus Workshop				10%	10%	
Attention-Grabber Discount	10%	10%	10%	10%	10%	
Find More Information On...		Page Four	Page Five	Page Six	Page Seven	



60th ANNIVERSARY DIAMOND SPONSORSHIP \$42,500

**NO LONGER
AVAILABLE**

*Must Commit by
April 30, 2023*



SPECIAL ANNIVERSARY-EXCLUSIVE BENEFITS

A special grouping of benefits available within one package for this year only, after which some benefits will be available to other supporters as attention grabber opportunities.

- **Only One Sponsor Accepted at this Level**
- Sponsor of Guest Room Keycard
- Sponsor of Lanyard
- Complimentary Under-Door Delivery
- Enhanced Logo Recognition
- Sponsor of Departure Snack Station
- Insert in Attendee Bag
- “Ask the Expert” Session (see below)

GENERAL & PRE-CONFERENCE BENEFITS

- Present Educational Webinar for NAEPC Members during 2023 (limited to three sponsoring firms)
- Logo / Link on [NAEPC Journal of Estate & Tax Planning](#) and within [NAEPC News](#) through 2023
- Logo / Link on [Conference](#) Webpage and Attendee Registration Page
- 2-Minute Firm-Provided Video on Conference Webpage and NAEPC YouTube Channel with One-Time Share in [NAEPCs Primary LinkedIn Group](#)
- Pre- and Post-Conference Attendee List Including Email Addresses

ATTENDANCE & ATTENDEE BENEFITS

- Eight Conference Registrations, Including Most Meals
- Six Nights of Overnight Accommodations at Host Hotel (room & tax only, standard guestroom)

SPEAKING & RECOGNITION BENEFITS

- “Ask the Expert” Session; a Casual Environment for Attendees to Approach Firm with Questions or Needs
- 60-Minute General Session Presentation* (up to three available, sessions are awarded first committed and approved, first placed when commitment is received by April 30th)
- Two-Minute Speaker Introduction for a General Session Presenter
- Verbal Appreciation from Podium

TOP BILLING LOGOS & PLACEMENT

- Logo on Attendee Bag & Insert Within (gift item, printed piece, etc.)
- Logo on Conference Signage
- Preferred and Expanded Exhibit Hall Placement
- Included on Exhibit Hall Bingo Card (incentivizes attendees to visit your booth) and Opportunity to Contribute a Prize for the Drawing

RELATED SPONSORSHIPS

- Council Leadership Day Activities (signage & verbal mention during all council leader activities)
- Signage at All Receptions Acknowledging Firm as Sponsor of Event
- Signage at the President’s Reception, the Conference VIP Event, plus Eight Invitations for Firm Representatives

CONTINUING THE RELATIONSHIP

- Early Bird Discount for 2024 Participation

**Session must meet the standards set forth on page 13 and are subject to approval.*



PREMIER SPONSORSHIP

\$27,500

Premier Sponsorship allows your firm to be the center of attention at the Annual NAEPC Advanced Estate Planning Strategies Conference.

GENERAL & PRE-CONFERENCE BENEFITS

- Discipline Exclusivity (multiple sponsors accepted from different professional disciplines)
- Present Educational Webinar for NAEPC Members during 2023 (limited to three sponsoring firms)
- Logo / Link on [NAEPC Journal of Estate & Tax Planning](#) and within [NAEPC News](#) through 2023
- Logo / Link on [Conference](#) Webpage and Attendee Registration Page
- 2-Minute Firm-Provided Video on Conference Webpage and NAEPC YouTube Channel with One-Time Share in [NAEPCs Primary LinkedIn Group](#)
- Pre- and Post-Conference Attendee List Including Email Addresses

ATTENDANCE & ATTENDEE BENEFITS

- Five Conference Registrations, Including Most Meals
- Four Nights of Overnight Accommodations at Host Hotel (room & tax only, standard guestroom)

SPEAKING & RECOGNITION BENEFITS

- 60-Minute General Session Presentation* (up to three available, sessions are awarded first committed and approved, first placed when commitment is received by April 30th)
- Two-Minute Speaker Introduction for a General Session Presenter
- Verbal Appreciation from Podium

LOGOS & PLACEMENT

- Logo on Attendee Bag
- Logo on Conference Signage
- Preferred and Expanded Exhibit Hall Placement
- Included on Exhibit Hall Bingo Card (incentivizes attendees to visit your booth) and Opportunity to Contribute a Prize for the Drawing

RELATED SPONSORSHIPS

- Council Leadership Day Activities (signage & verbal mention during all council leader activities)
- Signage at One Evening Reception Acknowledging Firm as Sponsor of Event
- Signage at the President's Reception, the Conference VIP Event, plus Five Invitations to Attend for Firm Representatives

CONTINUING THE RELATIONSHIP

- Right of First Refusal for 2024 Premier Sponsorship with Commitment by December 31, 2023
- Early Bird Discount for 2024 Participation

**Session must meet the standards set forth on page 13 and are subject to approval.*

Direct inquiries about sponsorship opportunities to Ed Socorro • sponsorship@NAEPC.org / (312) 600-5303

National Office: 2001 Crocker Rd., Ste. 510 • Westlake, OH 44145 • (866) 226-2224



CONTINUING EDUCATION SPONSORSHIP

\$17,500

Continuing education credit is a valuable component of the educational portion of the program. Your firm's support allows us to provide varying types of national, multi-disciplinary credit to conference attendees.

GENERAL & PRE-CONFERENCE BENEFITS

- Logo / Link on [NAEPC Journal of Estate & Tax Planning](#) and within [NAEPC News](#) through 2023
- Logo / Link on [Conference](#) Webpage and Attendee Registration Page
- 2-Minute Firm-Provided Video on Conference Webpage and NAEPC YouTube Channel with One-Time Share in [NAEPCs Primary LinkedIn Group](#)
- Pre- and Post-Conference Attendee List Including Email Addresses

CONTINUING EDUCATION

- Logo within Continuing Education Hub
- Logo on Continuing Education Instructions, Paper Check In / Out Form, Vouchers, and in Email that Contains Certificate



ATTENDANCE & ATTENDEE BENEFITS

- Four Conference Registrations, Including Most Meals
- Three Nights of Overnight Accommodations at Host Hotel (room & tax only, standard guestroom)
- Invitation for Four Firm Representatives to Attend NAEPC President's Reception, the Conference VIP Event

SPEAKING & RECOGNITION

- Two-Minute Speaker Introduction for a General Session Presenter
- Verbal Appreciation from Podium

LOGOS & PLACEMENT

- Logo on Attendee Bag
- Logo on Conference Signage
- Preferred and Expanded Exhibit Hall Placement
- Included on Exhibit Hall Bingo Card (incentivizes attendees to visit your booth)

RELATED SPONSORSHIP

- Signage at One Evening Reception Acknowledging Firm as Sponsor of Event

CONTINUING THE RELATIONSHIP

- Right of First Refusal for 2023 Continuing Education Sponsor with Commitment by December 31, 2023
- Early Bird Discount for 2024 Participation



ENHANCED PARTNER YOUR WAY SPONSORSHIP

\$11,500

NAEPCs signature offering, Enhanced Partner “Your Way”, allows conference supporters the flexibility to choose the benefits that are most valuable to their firm. Benefit choices must be made at the time of commitment and cannot be changed at a later date.

STANDARD BENEFITS

3 Registrations, Including Most Meals
Standard Six-Foot Exhibition Table
Pre & Post Conference Attendee List (Postal Addresses Only)
Early Bird Discount for 2024 Participation

FIVE CHOICES FROM THE LIST BELOW

Indicate your firm’s preferred benefits below and submit this page with your commitment form.

- ☐ Provide One Educational Bonus Workshop * (scheduled during breakfast on Tuesday and Wednesday, limited availability)
- ☐ Expanded Exhibition Space (ten-foot exhibition table or equivalent space for a pop-up booth) & Premium Placement
- ☐ Standard Electrical Service in Exhibit Booth
- ☐ Logo / Link within [NAEPC News](#) Membership Newsletter & on the [NAEPC Journal of Estate & Tax Planning](#) (time of commitment through year-end)
- ☐ Logo / Link on Conference Webpage
- ☐ Placement on Exhibit Hall Bingo Card (Incentivizes Attendees to Visit your Booth) and an Opportunity to Contribute One Prize for Drawing
- ☐ Two-Minute Speaker Introduction (includes a one-minute firm introduction)
- ☐ Logo / Link on All Conference Email and Confirmation Messages
- ☐ Add Email Addresses to Attendee Lists
- ☐ Two Nights of Overnight Accommodations at Host Hotel (room & tax only, standard guestroom)
- ☐ Invitation for Three to Attend the President’s Reception, the Conference VIP Event
- ☐ 2-Minute Firm-Provided Video on Conference Webpage and NAEPC YouTube Channel with One-Time Share in [NAEPCs Primary LinkedIn Group](#)

**Session must meet standards set forth on page 14 and are subject to approval.*



PARTNER YOUR WAY SPONSORSHIP

\$5,500

NAEPCs signature offering, Partner “Your Way”, allows conference supporters the flexibility to choose the benefits that are most valuable to their firm. Benefit choices must be made at the time of commitment and cannot be changed at a later date.

STANDARD BENEFITS

2 Registrations, Including Most Meals
Standard Six-Foot Exhibition Table
Pre & Post Conference Attendee List (Postal Addresses Only)
Early Bird Discount for 2024 Participation

FOUR CHOICES FROM THE LIST BELOW

Indicate your firm’s preferred benefits below and submit this page with your commitment form.

- ☐ Premium Booth Placement (accommodates six-foot standard exhibition table)
- ☐ Standard Electrical Service in Exhibit Booth
- ☐ Logo / Link within [NAEPC News](#) Membership Newsletter & on the [NAEPC Journal of Estate & Tax Planning](#) (time of commitment through year-end)
- ☐ Logo / Link on Conference Webpage
- ☐ Placement on Exhibit Hall Bingo Card (Incentivizes Attendees to Visit your Booth) and an Opportunity to Contribute a Prize
- ☐ Two-Minute Speaker Introduction (includes a one-minute firm introduction)
- ☐ Logo / Link on All Conference Email and Confirmation Messages
- ☐ Add Email Addresses to Attendee Lists

BONUS OPPORTUNITY

- ☐ Host an Educational Bonus Workshop, Scheduled during Breakfast on Tuesday & Wednesday
\$3,900 Fee Applies

Session must meet standards set forth on page 14 and are subject to approval. Availability is limited.

EXHIBITOR

\$2,750

STANDARD BENEFITS

1 Registration*, Including Most Meals
Standard Six-Foot Exhibition Table
Pre & Post Conference Attendee List (Postal Addresses Only)
Early Bird Discount for 2024 Participation

*Exhibitors can register additional hall-only attendees within the final logistics kit; a per-person fee will apply.



CORPORATE SUPPORT

\$1,500

Unable to sponsor or exhibit the program, but still want to support the association and its members? Become a corporate supporter, which provides signage recognition throughout the program.

ATTENTION GRABBERS

Attention Grabbers are available to registered sponsors & exhibitors.

All Sponsors receive a 10% discount on these selections.

Audio-Visual	\$1,500	Visual recognition on general session welcome screen for the entire conference	
Green Water Stations	\$500	You provide a water bottle with your logo that gets distributed to each registrant and NAEPC provides the water stations in the general session room from Monday - Wednesday with a sign at each cooler that displays your firm logo.	<i>one available</i>
Notepad	\$750	You supply the notepads and we will make sure that they are at each place setting in the general session room at the beginning of each morning	
Power	\$1,000	Logo placement on signage near pods of power and on charging station in the general session space	<i>one available</i>
Under-Door Delivery	\$1,500	NAEPC will arrange for distribution of your firm-created and printed piece to each attendee under their guestroom door while they are away at sessions.	<i>multiple sponsors from different disciplines accepted Sunday, Monday and Tuesday</i>
Mid-Morning Coffee	\$750	Your firm's logo will be displayed on a sign that includes all mid-morning coffee sponsors near the station that is available following breakfast and up to the morning break for the duration of the conference.	
Breakfast	\$1,000	Your firm's logo will be displayed on a sign near the food stations that contains the logos of all sponsoring firms for the duration of the conference.	
Lunch	\$1,250	Your firm's logo will be displayed on a sign near the food stations that contains the logos of all sponsoring firms for the duration of the conference.	



EXHIBIT HALL BASICS

- Booth assignments are handled internally.
- The exhibit hall utilizes tabletop exhibits rather than 10 x 10 booths separated by pipe and drape. **Only table top displays are permitted** (with the exception of Diamond Anniversary, Premier, Continuing Education, and Enhanced Partner Your Way sponsors that have chosen expanded space.) Small retractable signage (3-foot pop-up banners) are acceptable when placed in a location that does not interfere with the flow of traffic and/or sight lines.
- Each exhibitor area will include one six-foot dressed table, two chairs, and a wastebasket.

Shipping & Receiving

Sponsors and exhibitors will ship materials directly to the hotel; NAEPC does not utilize an exhibition company. Instructions will be provided in the final sponsor logistics kit, which is distributed late summer.

Set-Up, Tear-Down, and Hall Hours (subject to adjustment)

Set-up:	Sunday, November 12, 2023 between 12:00 pm and 4:00 pm
Exhibitor Reception:	Sunday, November 12, 2023 at 4:00 pm
Tear-down:	Wednesday, November 15, 2023 at 1:00 pm

The Exhibit Hall will be open during meal and break periods beginning after set-up and until tear-down time; receptions, meals, and breaks will take place within. A final schedule of events will be published in the conference sponsor logistics kit. **Those who dismantle before the published tear-down time may revoke the right to participate at future NAEPC programs.**

ABOUT THE NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS

The [National Association of Estate Planners & Councils](#) (NAEPC) cultivates excellence in estate planning by serving estate planning councils and their credentialed members, delivering exceptional resources and unsurpassed education, and recognizing those members within who hold the [Accredited Estate Planner®](#) designation and [Estate Planning Law Specialist](#) certification.

EXCELLENCE IN ESTATE PLANNING

We are a national network of over 2,200+ [Accredited Estate Planner®](#) designees and 265 affiliated estate planning councils and their 30,000 credentialed members, all focused on establishing and monitoring the highest professional and educational standards. Our shared belief is that the team approach to estate planning best serves the client.

CONFERENCE INFORMATION

The conference features 2 ½ days of technical education (Monday, November 13, 2023 through lunch on Wednesday, November 16, 2023) followed by two half-day sessions focusing on best practices for approximately 130 leaders of affiliated councils throughout the country. Attendance is expected to reach or exceed 400 attorneys, trust officers, accountants, insurance and financial planners, and philanthropic professionals.



We are delighted to return to [Fort Lauderdale, Florida](#) and [Marriott Harbor Beach Resort & Spa](#). The hotel perfectly blends relaxed tropical serenity with Marriott's well-known standard of service. Attendees will experience a beachfront location with modern and plentiful amenities close to shops, dining, and nightlife for the perfect marriage of conference + relaxation.



60th ANNUAL CONFERENCE COMMITMENT FORM & RECEIPT

12.2022

Step 1 - identify your level of support

Commitment		
Diamond Anniversary Sponsorship <i>*session application required with commitment</i>	\$42,500	
Premier Sponsorship <i>*session application required with commitment</i>	\$27,500	
Continuing Education Sponsorship	\$17,500	
Enhanced Partner Your Way Sponsorship <i>*selections & session application required with commitment (if bonus workshop is chosen)</i>	\$11,500	
Partner Your Way Sponsorship <i>*selections & session application required with commitment (if a bonus workshop is chosen)</i>	\$5,500	workshop addition: \$3,900
Exhibitor	\$2,750	
Attention Grabber Choice: _____	_____	

Step 2 - tell us about your firm

HOW SHOULD YOUR COMPANY NAME APPEAR IN OUR MATERIALS? *Please be exact and print legibly.*

Discipline / Specialty (check all that apply or fill in the "other" section):

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

Website Address _____

Primary Contact _____

Telephone # _____ Email _____

Address _____

City, State & Zip Code _____

Signature _____

By signing above, I/we agree to comply with the rules & regulations included within this prospectus.

Additional/Marketing Contact

(This person will be copied on all pre-conference details and communication, including the final logistics kit that provides information on set-up, hall hours, shipping, and requests the firm's attendees, etc. If none, leave blank.)

Marketing Contact _____

Telephone # _____ Email _____

Address _____

City, State & Zip Code _____

Step 3 - provide payment

Payment required
with commitment;
this page is
your receipt.

Enclosed is our \$ _____ check payable to "NAEPC" *or*

Bill credit card number _____ Exp. Date _____

Amount \$ _____ Name as it appears on card _____

Signature _____

Direct inquiries about sponsorship opportunities to Ed Socorro • sponsorship@NAEPC.org / (312) 600-5303

National Office: 2001 Crocker Rd., Ste. 510 • Westlake, OH 44145 • (866) 226-2224



MAILING LIST USAGE POLICY

All conference sponsors and exhibitors receive one pre-conference and one post-conference mailing list of contact details for use in promoting their attendance at the annual conference and/or the hosting of supplemental events*. This list will include name, designations/discipline, firm name, and postal mailing address to the extent that they were provided by the attendee for those who have not opted out of receiving sponsor messages. Diamond Anniversary, Premier & Continuing Education Sponsors and Partner Your Way sponsors that opted in will also receive email addresses within the attendee list.

The pre-conference list will be emailed to the primary and marketing contact four weeks prior to the program and the post-conference list will be sent two weeks after the conclusion of the program. By accepting delivery of these lists, a sponsoring or exhibiting company agrees to the terms outlined below.

- User may use attendee contact information for an approved use **ONCE** each time an attendee list is distributed. The pre-conference list may only be used pre-conference and the post-conference list must be used within thirty (30) days of the date on which it was sent to the sponsoring or exhibiting firm by NAEPC.
- All messages must contain a mechanism by which the recipient can opt-out.
- NAEPC and National Association of Estate Planners & Councils names or logos may not be used on any material mailed by user. The sponsoring or exhibiting company must reference their attendance at the “60th Annual NAEPC Advanced Estate Planning Strategies Conference”.
- An approved use includes a postal mailing or an email message (email is only permitted when the sponsor’s list includes email addresses).
- Use of the list to gather phone numbers is prohibited, as is telephoning those who appear on the lists.
- User may not copy, replace, or duplicate the information contained within, any portion thereof, or extract or retain any information there from. User may not at any time permit any attendee names and addresses to pass into the hands of any other person, association, organization, or company.
- User will hold the provider harmless against any damages or claim of damage, costs and reasonable attorney fees, arising out of any actual or alleged impropriety or illegality of mailed matter or infringement of trademark, trade name, or copyright belonging to others.
- User agrees to forward within ten (10) days following receipt, any letters or documents (or copies thereof) of complaints received from attendees or a report of verbal complaints by attendees regarding the user’s mailing, the matter transmitted therein, or the offered product or service.
- The user is solely responsible for determining that the information provided is sufficiently accurate for the user’s purposes.

Any prohibited or unauthorized use by sponsoring or exhibiting company or failure to report attendee complaints as described above shall constitute a material breach of the sponsorship agreement and may exclude company from participation in future NAEPC events.

**See page 16 for information about hosting sponsored or supplemental events.*

RULES & REGULATIONS

These instructions and regulations have been formulated for the best interest of the sponsor / exhibitor and conference attendees.

Commitment, Payment & Cancellation • Full payment is required with the commitment form. Sponsor / exhibitor commitments are non-refundable. NAEPC has the right to refuse participation to any person or firm that, in its sole discretion, does not support the mission of the association or the educational and other purposes of the NAEPC Advanced Estate Planning Strategies Conference.



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, frustration of purpose, commercial impracticability, or any other cause beyond the control of the NAEPC, this agreement shall terminate, and NAEPC 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. NAEPC reserves the right to adjust the floor plan in the event of conflicts, either in advance of the conference or on-site.

Character of Exhibits • No exhibit shall 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 audio-visual 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.

Dismantling • No booth may be dismantled until the official tear-down time. Any exhibitor that begins dismantling before this time may revoke their right to exhibit at any future NAEPC conference.

Distribution of Printed Matter • Except from within rented space or as purchased as a part of this prospectus, exhibitors and sponsors shall not distribute printed matter, samples, souvenirs, and the like. Distribution of materials elsewhere in the exhibit hall, session space, in the hotel, or on hotel property is not permitted.

Functions, Supplemental & Social Events • 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, large group dinners, hospitality suites, or alternative transportation to off-site conference related events. Small group dinners are excluded from this requirement. Any sponsor / exhibitor deemed to have scheduled a competing event may revoke their right to participate in future NAEPC conferences. Pre-paid sponsor / exhibitor fees will not be refunded. See page 16 for more information with regard to social events.

Insurance & Liability • Sponsor / exhibitor assumes entire responsibility and hereby agrees to protect, indemnify, defend, and save the NAEPC and its employees, independent contractors, 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, or for the conduct of or harm caused to attendees at any special supplemental event hosted by the sponsors/exhibitor, excluding any such liability caused by the sole negligence of NAEPC and its employees and board of directors.

Programming • Sponsors / exhibitors may not conduct promotional or educational programming including lectures, demonstrations or audiovisual presentations during conference programming hours with the exception of approved Bonus Workshop and Sponsored General 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 damage, 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 email (the "Logistics Kit").

Staffing and Behavior of Sponsor / Exhibitor Representatives • A company representative must be in attendance at the exhibit booth during the hours the exhibit hall is open. Any sponsor / exhibitor representative or firm displaying inappropriate or aggressive behavior and/or sales tactics, including, but not limited to, touching participants and/or their apparatus without their express permission, will be asked to leave immediately and may result in the removal of an exhibit or cancellation of a sponsorship with no refund of fees, including, but not limited to the sponsor / exhibitor fee, transportation and lodging costs, meals, shipping costs, etc. All firm representatives must adhere to the NAEPC Event Conduct Statement: www.naepc.org/content/conduct.

Subletting Space • Subletting or sharing of space is not permitted.



GENERAL SESSION FAQ

Sponsored sessions are provided as a way for organizations supporting the annual conference at the Premier level to enrich the educational experience of, and gain additional exposure to, attendees.

When are the sessions offered?

Up to three sessions will be offered during the conference (Monday, Tuesday, and/or Wednesday; schedule is created by NAEPC). **The sessions will be offered first committed, first approved, first confirmed.**

Topic & Session Guidelines

All sessions must focus primarily on one or more topics outlined within the [NAEPC Definition of Estate Planning](#), qualify for multi-disciplinary continuing education credit, and speakers must be of national prominence; sales and marketing presentations and/or topics are prohibited.

TOPIC GUIDELINES

Interested sponsors must submit a complete application (page 15 of this packet) and all requested supporting documents with the commitment form and payment. Applications will be reviewed by NAEPC and a determination will be communicated within 30 days of receipt or as early as practical. At no time shall a session provider deny attendance to their session to any conference attendee. 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 30th will have information about their session included in the registration materials. The materials will clearly indicate that the program is a sponsored session and will include notice of the sponsoring company.

What will NAEPC provide for our session?

- NAEPC will provide standard audio-visual equipment for the session (one podium and microphone per presenter, screen, laptop, and projector).
- Complimentary conference registration for one (1) presenter*.

What will NAEPC not provide as a part of our session?

NAEPC will not provide reimbursement for speaker travel or lodging expenses. Should a speaker require an honorarium, that expense is the sole responsibility of the sponsor. Should special audio-visual, staging, or set-up be requested, that expense is the sole responsibility of the sponsor.

Continuing Education Credit

The session is a part of the main conference and multi-disciplinary credit is requested for the program. As a result, the sponsoring company and all presenters **must** adhere to all requests and deadlines with regard to CE filing. This may include, but is not limited to, a full speaker biography, outline, timely completion of instructor registration forms, various state filing forms, and/or other documents as requested. Failure to comply with these requests may be cause for cancellation of the session with no refund of sponsorship fees to the sponsoring company.

How many people will attend our session?

NAEPC does not estimate or guarantee attendance for a sponsored 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 30th will be promoted to the best of NAEPC's abilities online and in print.

Can we distribute printed material during/at the session?

Printed material cannot be distributed to attendees during or at the session.

**Registration is in addition to the registrations that are furnished as a part of the benefits of the chosen level of support.*

Direct inquiries about sponsorship opportunities to Ed Socorro • sponsorship@NAEPC.org / (312) 600-5303

National Office: 2001 Crocker Rd., Ste. 510 • Westlake, OH 44145 • (866) 226-2224



BONUS WORKSHOP FAQ

Bonus Workshops are provided for those organizations supporting the annual conference to enrich the educational experience of attendees. Partner Your Way Enhanced Sponsors are eligible to opt-in to hosting a session as part of the benefit package while Partner Your Way Sponsors can opt-in to hosting a session for a fee.

When are the sessions offered?

These special sessions will be offered from 7:00 am – 7:50 am* on the mornings of Tuesday and Wednesday (up to 2 concurrent sessions will be offered each morning).

Topic & Session Guidelines

All sessions must focus primarily on one or more topics outlined within the [NAEPC Definition of Estate Planning](#) and speakers must be of national prominence; sales and marketing presentations and/or topics are prohibited. Interested sponsors must submit a complete application (page 15 of this packet) and all requested supporting documents with the commitment form and payment. Applications will be reviewed by NAEPC and a determination will be communicated within 30 days of receipt or as early as practical. At no time shall a session provider deny attendance to their session to any conference attendee. Tactics designed to increase attendance or sway attendees to choose one session over another, such as contests, are prohibited. NAEPC reserves the right to deny an application that is incomplete or does not meet the guidelines with regard to subject matter.

TOPIC GUIDELINES

What will NAEPC do to promote our session?

Those companies that have applied and been approved to participate by April 30th will have information about their session included in the registration materials. Please note that the materials will clearly indicate that the program is sponsored and will include notice of the sponsoring company.

What will NAEPC provide for our session?

- NAEPC will provide a podium, microphone, screen, and projector; speakers must bring a laptop. 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 the hotel's AV contact to make arrangements.
- Complimentary conference registration for one (1) presenter**.

What will NAEPC not provide as a part of our session?

NAEPC will not provide reimbursement for speaker travel or lodging expenses. Should a speaker require an honorarium, that expense is the sole responsibility of the sponsor. Should special audio-visual, staging, or set-up be requested, that expense is the sole responsibility of the sponsor.

Can our Company Provide Continuing Education Credit for the Program?

Yes! Although **NAEPC will not file a Sponsor Bonus Workshop 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 Workshop, 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 30th will be promoted to the best of NAEPC's abilities online and in print. Room deliveries are available to promote a session for a nominal fee (see Attention Grabbers within the prospectus).

Can we distribute printed material during/at the session?

Yes, you may.

**Timing subject to change.*

***Registration is in addition to those that are furnished as a part of the benefits of the sponsor's level of support.*

Direct inquiries about sponsorship opportunities to Ed Socorro • sponsorship@NAEPC.org / (312) 600-5303

National Office: 2001 Crocker Rd., Ste. 510 • Westlake, OH 44145 • (866) 226-2224



APPLICATION FOR GENERAL SESSION, BONUS WORKSHOP, OR WEBINAR

We are applying for a ___ general session & webinar / ___ bonus workshop.

If your firm is applying for a general session and webinar, and the subjects will be different, please submit two versions of this page.

Company Name _____

Please complete this portion if the contact person for this session is different than the individual(s) noted on the commitment form:

Name _____

Telephone # _____ Email _____

Address _____

City, State & Zip Code _____

Please provide information about your session below. The information you provide may be published in the annual conference registration materials.

Session Title (not topic) _____

Knowledge Level (choose one) _____ Basic _____ Intermediate _____ Advanced

Speaker Full Name & Professional Designations _____

REQUIRED ATTACHMENT: *Current biography for the speaker(s).*

One Paragraph Description

REQUIRED ATTACHMENT: *Detailed outline AND sample PowerPoint slides for the program.*

Please provide three learning objectives for the program ("attendees will learn"):

- 1 _____
- 2 _____
- 3 _____

Please explain how this session's content fits within the [NAEPC Definition of Estate Planning](#):

For sessions taking place at the conference, do you have a preference with regard to the day of your session?

**NAEPC will do its best to accommodate the noted preference, but cannot guarantee the request.*

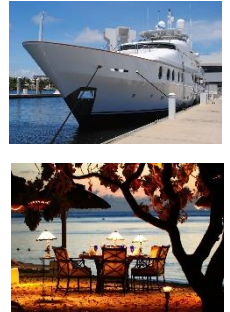
By signing below, I/we agree to comply with the rules & regulations outlined within the sponsorship packet and for the type of session we have chosen. If my/our information is accepted, I agree that the subject matter will be appropriate to the audience, educational, not of a sales nature and not selling a product or service offered by my/our company, and will be an accurate reflection of what has been outlined within this page and supporting materials. Furthermore, I understand and acknowledge that NAEPC cannot guarantee a specific day for the presentation or attendance at my/our session.

Signature _____ Date _____



SOCIAL EVENTS

Social events enhance the conference experience for attendees and provide sponsoring and exhibiting firms with an opportunity to spend time with those with whom they most align. NAEPC is interested in growing the number and type of supplemental events hosted by sponsoring and exhibiting firms during the Annual Advanced Estate Planning Strategies Conference. A group dinner at a famous local restaurant, special outings, a beach party, dancing lessons, an early riser yoga class... the options are limited only by your firm's creativity.



Firms interested in hosting a social or supplemental event during the conference should submit this form for committee consideration to conference@naepc.org no less than 30 days before the program begins. Those firms that receive approval for their event will receive an additional attendee list with email seven days before the program for the sole use of promoting their event to attendees. **This list may be used once.**

Company Name _____

Please complete this portion if the contact person for this session is different than the individual(s) noted on the commitment form:

Name _____

Telephone # _____ Email _____

Address _____

City, State & Zip Code _____

When would you like to host the event? Date _____ Start & End Time _____

Where do you intend to host the event? _____

Who will be invited? ☐ All conference attendees ☐ Other, please describe below

Please describe your event:

Will you be providing transportation to and from the event? ☐ Yes ☐ No ☐ Not Applicable

Please share additional details you feel would be helpful for the committee here:

By signing below I/we agree to comply with the rules & regulations outlined within the sponsorship packet and specifically for supplemental events. I/we understand that I will receive two lists of attendees, one approximately thirty days pre-conference and the final approximately seven days pre-conference. I understand that NAEPC is unable to offer verbal mention about my event from the podium. Should your firm wish to explore additional marketing opportunities, please contact our sponsorship coordinator. If my/our event is approved, I/we understand that timing cannot conflict with any conference-related event and agree to notify NAEPC immediately if any event-related details change from what I have submitted above. Furthermore, I/we understand that NAEPC cannot guarantee attendance at my/our event.

Signature _____ Date _____

