



## 60<sup>th</sup> ANNUAL NAEPC ADVANCED ESTATE PLANNING STRATEGIES CONFERENCE MAILING LIST USAGE POLICY

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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 “60<sup>th</sup> 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 [of the prospectus](#) for information about hosting sponsored or supplemental events.*

### NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS

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