

58<sup>th</sup> Annual NAEPC  
Advanced Estate Planning Strategies  
Virtual Conference

November 2 - 4, 2021

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SUPPORTER PROSPECTUS

**NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS**

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1120 CHESTER AVENUE, SUITE 470 CLEVELAND, OH 44114  
(866) 226-2224 · [NAEPC.ORG](http://NAEPC.ORG) · [CONFERENCE@NAEPC.ORG](mailto:CONFERENCE@NAEPC.ORG)

## Event at a Glance ·

Join an estimated 400-600 attendees for NAEPCs second virtual learning conference. Complete with nine general sessions, 11 sponsored sessions, a virtual exhibition hall, one-on-one networking opportunities, and the experience of an in-person conference without the expense of travel, the 58<sup>th</sup> Annual NAEPC Advanced Estate Planning Strategies Virtual Conference will provide the simplicity of an online event while maximizing the value of your sponsorship dollars.

Conference Hours	Tuesday, November 2, 2021	11:00 am ET – 6:00 pm ET + social event
	Wednesday, November 3, 2021	11:00 am ET – 6:00 pm ET + social event
	Thursday, November 4, 2021	11:00 am ET – 5:30 pm ET

<i>Overview of Opportunities &amp; Benefits ·</i>	Sponsor	Exhibitor
Cost of Entry	\$4,000	\$2,000
Booth Staff Registrations	Unlimited	Unlimited
Complimentary Educational Attendee Registrations	4	2
Exhibitor Booth with Live Streaming, Firm Contact Information & Materials Upload	Large	Standard
Ability to Participate in Live Meetings with Attendees	✓	✓
Pre- and Post- Conference Attendee List with Email Addresses (One Each)	✓	✓
“Gamification” that Incentivizes Attendees to Visit the Exhibit Hall and Speak with Supporters & Opportunity to Contribute Prize to Winners	Elevated Points	Standard Points
Lead Generation Details	✓	✓
On-Demand Program and Booths Available for 30 Days Post-Conference	✓	✓
Logo Placement on Attendee FAQ Page of Portal	✓	
Rotating Logo Placement in Conference Lobby and Static Placement on Attendee Registration Page	✓	
Largest and First Firms Noted Alphabetically in Exhibit Hall	✓	
Logo, Link & Opportunity to Provide 2-Minute Video Message for Posting on Conference Page of <a href="http://www.NAEPC.org">www.NAEPC.org</a>	✓	
Logo and Link in Sponsors Section of the <i>NAEPC Journal of Estate &amp; Tax Planning</i> through March 31, 2022	✓	
Logo and Link Placement in <i>NAEPC News</i> through March 31, 2022	✓	
Included in “Thank You” Post in NAEPCs General LinkedIn Group Once Each Month from July through December, 2021	✓	

# Elevate Your Participation ·

## Presentation Opportunities (Available only to sponsors)

### Exclusive Bonus Session · \$12,500

This option allows your firm to host an exclusive educational bonus session during the designated timeslot, which runs concurrently with exhibit hall hours. These limited sessions are offered first committed, first awarded.

11:30 am ET on November 2<sup>nd</sup>  
5:15 pm ET on November 3<sup>rd</sup>

Presenter and content must be approved by NAEPC; the application (pg. 8) is **required** with the commitment form.

Commitments will not be processed until a complete session application and supplemental information has been received.

### Concurrent Bonus Session · \$3,000

This option allows your firm to host one of up to three educational bonus sessions during the designated timeslot, which runs concurrently with exhibit hall hours. These limited sessions are offered first committed, first awarded.

5:15 pm ET on November 2<sup>nd</sup>  
11:30 am ET on November 3<sup>rd</sup>  
11:30 am ET on November 4<sup>th</sup>

Presenter and content must be approved by NAEPC; the application (pg. 8) is **required** with the commitment form.

Commitments will not be processed until a complete session application and supplemental information has been received.

## Visibility Opportunities (Available to sponsors and exhibitors)

### Session Open / Close · \$1,400

This is the perfect option for the firms that want the spotlight, but aren't interested in hosting a bonus session.

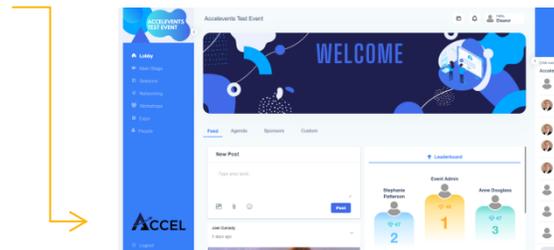
At the beginning of the session your representative will receive one minute to introduce your firm and its services followed by one minute to introduce the speaker. At the conclusion of the session your representative will receive an additional minute to thank the speaker and attendees and to guide attendees to the next session or activity.

Nine Available · Sessions will be assigned by NAEPC

### Portal Logo Placement · \$1,750

This option places your firm logo on the left side of *every page* of the conference portal.

One placement is available.



## Sponsored Social Event Opportunities

(Sponsors have exclusive first right of refusal until Monday, August 2, 2021,  
open to all supporters on August 3, 2021 pending availability)

**\$7,500**

This new opportunity allows your firm to plan and host an exclusive post-conference social event on a platform of your choosing on either November 2<sup>nd</sup> or November 3<sup>rd</sup> at 6:00 pm ET. A wine or chocolate tasting, mixology class, floral design, cooking class... the experience is limited only by your firm's creativity!

Event theme and details must be approved by NAEPC; the application (pg. 9) is **required** with the commitment form. Commitments will not be processed until a complete application has been received.

## The Exhibit Hall ·

NAEPC will be hosting its conference on the Acelevents platform. This dynamic virtual conference platform puts the control into the hands of sponsors and exhibitors by:

- Having complete control of booth set up (training available)
- Hosting live individual or group conversations during the conference
- Allowing attendees to request information directly from you
- Making materials available for download

*Exhibitors are required to have their virtual booth set-up on or before close of business on Friday, October 22, 2021.*

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## Bonus Sessions ·

Sponsor Bonus Sessions are available to sponsors and intended to enrich the educational experience of attendees. The sponsoring company must provide content that is related to the profession of estate planning, timely and educational, and appropriate for a multi-disciplinary audience. Sales and marketing topics and presentations are prohibited, as are tactics designed to increase attendance or sway attendees to choose one bonus session over another, such as contests. Interested firms must submit a complete application (pg. 8) with the commitment form along with all requested supporting documentation. **There are no exceptions to this requirement; your commitment will not be processed until these details are received.** Applications will be reviewed by NAEPC and a determination will be communicated as promptly as possible. NAEPC reserves the right to deny any application. At no time shall a sponsor bonus session provider be permitted to deny attendance to their session to any conference attendee.

NAEPC will include the session in the schedule of events (clearly noted as a sponsored session), but cannot estimate or guarantee attendance.

## Session Open/Close ·

A session open / close provides added visibility and may help to drive traffic to your booth within the exhibit hall. Nine general sessions are available and will be assigned by NAEPC. At the beginning of the session your representative will receive one minute to introduce your firm and its services followed by one minute to introduce the speaker. At the conclusion of the session your representative will receive an additional minute to thank the speaker and attendees and to guide attendees to the next session or activity. Only one session will be awarded per company / conference. Please provide the name and contact information of the person who will be offering the introduction on your commitment form.

## Sponsored Social Events ·

This new addition to our offerings allows sponsors to host a purely social event at the end of the day on Tuesday or Wednesday; only one opportunity will be offered each evening. The event must be social, as opposed to providing technical education. Examples include a wine or chocolate tasting where the sponsoring firm delivers samples to those who have registered to attend, a comedian, a lesson on floral creation, etc. Given the scope of NAEPC's online conference provider, we do recommend hosting the event outside of the Acelevents platform on one of the sponsoring firm's choosing so attendees can see one another, perhaps enter breakout rooms, etc. The responsibility and cost for planning these events lies with the sponsoring firm; NAEPC will make sure the attendees know of the event and how to register. NAEPC reserves the right to deny any application.

NAEPC will include the event in the schedule of events (clearly noted as a sponsored session), but cannot estimate or guarantee attendance. Interested firms must submit a complete application (pg. 9) with the commitment form.

# Commitment Form & Invoice

58<sup>th</sup> Annual NAEPC Advanced Estate Planning Strategies Virtual Conference

NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS

1120 CHESTER AVENUE, SUITE 470  
CLEVELAND, OH 44114

(866) 226-2224  
FAX · (216) 696-2582  
CONFERENCE@NAEPC.ORG

## Step 1; Choose your level of support:

- Sponsor (\$4,000)    Submitting a Two-Minute Video? Yes No
- Exhibitor (\$2,000)

## Step 2; Choose desired add-on item(s):

- Exclusive Bonus Session\* (\$12,500)
- Concurrent Bonus Session\* (\$3,000)
- Sponsored Social Event\* (\$7,500)
- Portal Logo Placement (\$1,750)
- Session Open/Close (\$1,400)

\*Application and items requested within required with commitment form.

Name / Email Address of the Person Giving Remarks  
 \_\_\_\_\_  
 \_\_\_\_\_

## Step 3; Tell us about your firm:

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

→ \_\_\_\_\_  
 \_\_\_\_\_

Our primary discipline/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   |                                                  |

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

Primary Contact \_\_\_\_\_

Telephone # \_\_\_\_\_ Email \_\_\_\_\_

Address \_\_\_\_\_

City, State & Zip Code \_\_\_\_\_

Marketing Contact \_\_\_\_\_

Telephone # \_\_\_\_\_ Email \_\_\_\_\_

Address \_\_\_\_\_

City, State & Zip Code \_\_\_\_\_

*This person will receive a copy of all pre-conference details and communication.*

Signature \_\_\_\_\_

*By signing above, I/we agree to comply with the rules & regulations outlined within this sponsorship packet.*

## Step 4; Payment:

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

Bill credit card number \_\_\_\_\_ Exp. Date \_\_\_\_\_

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

Signature \_\_\_\_\_

Full payment required  
with commitment.  
  
**THIS PAGE IS YOUR  
INVOICE AND RECEIPT**



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

# 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, 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.

## Programming •

Sponsors / exhibitors may not conduct promotional or educational programming including, but not limited to, lectures and demonstrations during conference programming hours with the exception of approved Sponsor Bonus Sessions.

## 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 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. Representatives must adhere to the NAEPC Event Conduct Statement: [www.naepc.org/content/conduct](http://www.naepc.org/content/conduct).

## 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.

# About the National Association of Estate Planners & Councils •

The National Association of Estate Planners & Councils (NAEPC) serves its affiliated estate planning councils and their credentialed members and fosters the multi-disciplinary approach to estate planning.

## COLLABORATE • EDUCATE • CULTIVATE

We are a national organization of over 2,100+ Accredited Estate Planner® designees, over 275 affiliated estate planning councils, and their 30,000 credentialed members, all focused on establishing and monitoring the highest professional and educational standards.

Our core and shared belief is **EXCELLENCE IN ESTATE PLANNING** and that the team approach best serves the client.

# *Mailing List Usage Policy* ·

All sponsors and exhibitors will receive one pre- and one post-conference mailing list of attendee contact details (name, designations, firm name, mailing address, email address) for use in promoting their attendance at the annual conference. Those attendees who have opted out of sponsor communications will not be included.

These lists will be emailed to the primary and marketing contact of the supporting firm one week prior to the start of the conference and one week following the conclusion of the program.

By accepting delivery of these lists, a sponsoring or exhibiting company agrees to the terms outlined below.

- 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 “58<sup>th</sup> Annual NAEPC Advanced Estate Planning Strategies Virtual Conference.”
- An approved use includes a postal mailing **or** an email message.
- Use of the list to gather phone numbers is prohibited, as is telephoning those who appear on the lists.
- User may use attendee contact information for an approved use once each time an attendee list is distributed. The pre-conference lists may only be used pre-conference and the post-conference list must be used within thirty (30) days of receipt of the list.
- 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 agrees to forward within ten (10) days following receipt, any letters, emails, or other documents (or copies thereof) containing 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.
- 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.

**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 years.**

# Sponsor Bonus Session Application ·

Company Name \_\_\_\_\_

Please complete this portion if the contact person is different than the person noted on the commitment form:

Contact \_\_\_\_\_

Telephone # \_\_\_\_\_ Email \_\_\_\_\_

Address \_\_\_\_\_

City, State & Zip Code \_\_\_\_\_

## Your Preferred Timeslot

### Exclusive Bonus Session Options

11:30 am ET on November 2<sup>nd</sup>

5:15 pm ET on November 3<sup>rd</sup>

### Concurrent Bonus Session Options

5:15 pm ET on November 2<sup>nd</sup>

11:30 am ET on November 3<sup>rd</sup>

11:30 am ET on November 4<sup>th</sup>

Please provide information about your session below taking special care to note that the **information you include may be published in the annual conference registration materials** if program is accepted.

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

Speaker Full Name & Professional Designations \_\_\_\_\_

Educational Level (circle or check)    Basic    Intermediate    Advanced

One Paragraph Session Description

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## **DOCUMENTS/ ATTACHMENTS REQUIRED WITH COMMITMENT & THIS PAGE**

- Detailed outline **and/or** PowerPoint presentation for the program
- Speaker Biography

By signing below, I/we agree to comply with the rules & regulations outlined within the sponsorship packet. If my/our information is accepted, I agree that the subject matter will be appropriate to the audience, educational, not of a marketing or 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 \_\_\_\_\_ Date \_\_\_\_\_

# Sponsor Social Event Application ·

**THIS PAGE REQUIRED WITH COMMITMENT FORM**

Company Name \_\_\_\_\_

*Please complete this portion if the contact person is different than the person noted on the commitment form:*

Contact \_\_\_\_\_

Telephone # \_\_\_\_\_ Email \_\_\_\_\_

Address \_\_\_\_\_

City, State & Zip Code \_\_\_\_\_

## Your Preferred Timeslot

6:00 pm ET on Tuesday, November 2<sup>nd</sup>

6:00 pm ET on Wednesday, November 3<sup>rd</sup>

## Please Tell Us about Your Event in Detail

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**Delivery Platform** \_\_\_\_\_

By signing below, I/we agree to comply with the rules & regulations outlined within the sponsorship packet. If my/our event proposal is accepted, I agree that the theme will be appropriate to the audience, not of a marketing or 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 social event.

Signature \_\_\_\_\_

Title \_\_\_\_\_ Date \_\_\_\_\_