

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

# 50th Annual Conference

**SPONSOR & EXHIBITOR PACKAGE**

November 20 ~ 22, 2013

Las Vegas, *Nevada*

**The Cosmopolitan *of* Las Vegas**



*Image courtesy of Las Vegas News Bureau*

Join us  
as we celebrate  
*50 years*  
of exceptional  
conferences with  
estate planning professionals  
from across the country... at the  
newest hotel on the Strip!

*We are...*

*The Association of Choice for Estate Planning Professionals*

**Direct inquiries about sponsoring this event to Ed Socorro**

**[esocorro@NAEPCmarketing.org](mailto:esocorro@NAEPCmarketing.org) / (312) 600-5303**

1120 Chester Ave., Ste. 470 ~ Cleveland, OH 44114-3514

(866) 226-2224 ~ fax (216) 696-2582 ~ [conference@naepc.org](mailto:conference@naepc.org)

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

The **National Association of Estate Planners & Councils** (NAEPC) is a national organization of 1,600+ Accredited Estate Planner<sup>®</sup> (AEP<sup>®</sup>) and Estate Planning Law Specialist (EPLS) designation holders. Its 235 affiliated estate planning councils and their 27,000 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 conferences, 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.

## **50<sup>th</sup> ANNUAL CONFERENCE & LOCATION INFORMATION**

The 3-day conference program features one day devoted solely to affiliated local estate planning council leadership development. As such, the Wednesday, November 20, 2013 schedule is geared toward information for leaders from the affiliated councils throughout the country. Approximately 125 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 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.

There are many reasons Las Vegas commands the title "The Entertainment Capital of the World." Some of the world's most exciting and versatile entertainers perform there including Celine Dion, Elton John, Jerry Seinfeld, Jay Leno, Garth Brooks, and so many more. Also, hot selling tickets include Broadway hits such as "Phantom - The Las Vegas Spectacular", "Jersey Boys", and "Tony & Tina's Wedding". Other entertainment options include A-list headliners like Brad Garrett, Ray Romano, and Kevin James who regularly bring their shows to Las Vegas showrooms and arenas; as well as several resident Cirque du Soleil productions, comedy clubs, classic Las Vegas showgirl revues, and more.

Located in the heart of The Las Vegas Strip, The Cosmopolitan of Las Vegas is a luxury resort & casino unlike any other. This original destination features oversized residential-styled living spaces with private terraces and breathtaking views of the Las Vegas skyline.

## **SPONSOR / EXHIBITOR INFORMATION**

Sponsor and exhibitor arrangements will be confirmed when an executed commitment form has been received (page 14 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 16, 17 and 18 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 information for participants is not provided.

Exhibitor set-up will take place the morning of Wednesday, November 20, 2013 and teardown will take place following lunch on Friday, November 22, 2013. 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 20, 2013. Attendees from sponsoring / exhibiting companies are permitted and encouraged to attend all conference related events, including the continuing education sessions.

**Direct inquiries about sponsoring this event to Ed Socorro**

**[esocorro@NAEPCmarketing.org](mailto:esocorro@NAEPCmarketing.org) / (312) 600-5303**

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Commitment Level	\$25,000 (one sponsor)
Payment Terms	\$15,000 due with commitment form, Balance paid by August 2, 2013

### Benefits

#### Special Benefits

- Only one sponsor at this level
- Opportunity to offer two, two-minute speaker introductions at no additional charge (one Thursday and one Friday)
- Logo on conference brochure provided to 20,000 estate planning professionals in the United States (commitment must be received by April 26, 2013 to take advantage of this benefit)
- Logo on the conference registrant “goodie bag”
- Sole sponsor of Wednesday evening Welcome Reception, including 5 minutes of microphone time to welcome guests at reception
- Logo and notation as “Anniversary Sponsor” on cover page of registrant binder
- Opportunity to host “*Sponsor Bonus Session*” with additional fee waived (space permitting at the time commitment form is received) – see page 13 for additional information
- Opportunity to participate as the Name Badge Sponsor at a reduced fee (\$3,000)
- Opportunity to participate as the Conference Shirt Sponsor at a reduced fee (\$7,500)

#### Conference Participation

- Expanded exhibition space (if desired) – *see page 12 for add'l exhibitor details*
- 8 full conference registrations
- 10 additional tickets to Wednesday evening Welcome Reception

#### Pre and Post-Conference Public Relations

- Noted as “Anniversary Sponsor” on all pre-conference event promotions
- Logo / listed on all NAEPC conference-related communications prior to event
- Banner placement on [www.NAEPC.org](http://www.NAEPC.org)
- **Extra benefit!** Banner placement on the online publication *NAEPC Journal of Estate & Tax Planning* from the time of commitment through April 30, 2014 ([www.naepcjournal.org](http://www.naepcjournal.org))
- Logo on conference page of NAEPC website with a link to company website
- Pre & post-conference list of postal mailing addresses for registered attendees

#### On-Site Conference Public Relations

- First full-page ad in conference binder
- Recognition from podium during conference
- Prominent logo included on banner displayed on site during conference and additional “Anniversary Sponsor” signage at registration
- Opportunity to insert additional take away item into conference registrant “goodie bag”

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# DIAMOND

Commitment Level \$15,000 (one per industry noted below)

Payment Terms \$10,000 due with commitment form  
Balance paid by August 2, 2013

## Benefits

### Special Benefits

- Exclusivity within each industry (accounting, appraisal/auction, disability insurance, financial planning, life insurance, legal and trust/banking). Assigned on a first come, first served basis
- Right of first refusal for 2014 conference participation at the Diamond Level (commitment must be received by December 31, 2013 to take advantage of this benefit)
- Logo on conference brochure– provided to 20,000 estate planning professionals in the United States (commitment must be received by April 26, 2013 to take advantage of this benefit)
- Opportunity to offer a two-minute speaker introduction at no additional charge (priority offered to Anniversary Sponsor)
- Opportunity to participate as the Name Badge Sponsor at a reduced fee (\$3000)

### Conference Participation

- Expanded exhibition space (if desired) – *see page 12 for add'l exhibitor details*
- 6 full conference registrations

### Pre and Post-Conference Public Relations

- Listed on all NAEPC conference-related communications prior to event
- **Extra benefit!** Logo placement on the online publication *NAEPC Journal of Estate & Tax Planning* from the time of commitment through April 30, 2014 ([www.naepjournal.org](http://www.naepjournal.org))
- Logo on conference page of NAEPC website with a link to company website
- Pre & post-conference list of postal mailing addresses for registered attendees

### On-Site Conference Public Relations

- Full-page ad in conference binder
- Recognition from podium during conference
- Prominent logo included on banner displayed on site during conference
- Opportunity to insert additional take away item into conference registrant “goodie bag”

*Upgrade!*

**DIAMOND ADVANTAGE SPONSORSHIP .**

*additional \$2,500*

By participating as a Diamond Advantage Sponsor, you are able to host a *Sponsor Bonus Session* on either Thursday or Friday morning. See page 13 for additional details!

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

*\*Advantage sponsorships are available first come, first served with priority given to those companies that provided a session the prior year.*

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# PLATINUM

Commitment Level	\$10,000 (unlimited per industry)
Payment Terms	\$5,000 due with commitment form Balance paid by August 2, 2013

## **Benefits**

### Special Benefits

- Logo on conference brochure– provided to 20,000 estate planning professionals in the United States (commitment must be received by April 26, 2013 to take advantage of this benefit)
- Opportunity to offer a two-minute speaker introduction at no additional charge (priority given to Anniversary and Diamond Sponsors)
- Opportunity to participate as the Name Badge Sponsor at a reduced fee (\$3000)

### Conference Participation

- Expanded exhibition space (if desired) – *see page 12 for add'l exhibitor details*
- 4 full conference registrations

### Pre and Post-Conference Public Relations

- Listed on all NAEPC conference-related communications prior to conference
- Logo on conference page of NAEPC website with a link to company website
- **Extra benefit!** Logo placement on the online publication *NAEPC Journal of Estate & Tax Planning* from the time of commitment through April 30, 2014 ([www.naepcjournal.org](http://www.naepcjournal.org))
- Pre & post-conference list of postal mailing addresses for registered attendees

### On-Site Conference Public Relations

- Full-page ad in conference binder
- Recognition from podium during conference
- Logo included on banner displayed on site during conference
- Opportunity to insert take away item into conference registrant “goodie bag”

*Upgrade!*

**PLATINUM ADVANTAGE SPONSORSHIP ·**

*additional \$2,500*

By participating as a Platinum Advantage Sponsor, you are able to host a *Sponsor Bonus Session* on either Thursday or Friday morning. See page 13 for additional details!

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

*\*Advantage sponsorships are available first come, first served with priority given to those companies that provided a session the prior year.*

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Commitment Level     \$5,000 (unlimited)  
Payment Terms         Full payment due with commitment form

**Benefits**

**Special Benefits**

- Printed name on conference brochure – provided to 20,000 estate planning professionals in the United States (commitment must be received by April 26, 2013 to take advantage of this benefit)
- *Extra benefit!* Logo placement on the online publication *NAEPC Journal of Estate & Tax Planning* from the time of commitment through April 30, 2014 ([www.naepcjournal.org](http://www.naepcjournal.org))
- Opportunity to opt in to provide a two-minute speaker introduction (charge applies)

**Conference Participation**

- Tabletop exhibition space (if desired) – *see page 12 for add'l exhibitor details*
- 3 full conference registrations

**Pre and Post-Conference Public Relations**

- Pre & post-conference list of postal mailing addresses for registered attendees

**On-Site Conference Public Relations**

- Full-page ad in conference binder
- Recognition from podium during conference
- Logo included on banner displayed on site during conference
- Opportunity to insert take away item into conference registrant “goodie bag”

*Upgrade!*

**GOLD ADVANTAGE SPONSORSHIP .**

*additional \$2,500*

By participating as a Gold Advantage Sponsor, you are able to host a Sponsor Bonus Session on either Thursday or Friday morning. See page 13 for additional details!

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

*\*Advantage sponsorships are available first come, first served with priority given to those companies that provided a session the prior year.*

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# SILVER

Commitment Level      \$2,500 (unlimited)

Payment Terms            Full payment due with commitment form

## **Benefits**

### Conference Participation

- Tabletop exhibition space (if desired) – *see page 12 for add'l exhibitor details*
- 2 full conference registrations
- Opportunity to opt in to provide a two-minute speaker introduction (charge applies)

### Pre and Post-Conference Public Relations

- Pre & post-conference list of postal mailing addresses for registered attendees

### On-Site Conference Public Relations

- Printed name included on banner displayed on site during conference
- Half-page ad in conference binder
- Opportunity to insert take away item into conference registrant “goodie bag”

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## Conference Continuing Education Credit Sponsorship

Your company logo will be placed on the “information for attendees” page distributed to all continuing education credit-seeking attendees.

Commitment Level	\$25,000
Payment Terms	\$10,000 due with commitment form Balance paid by August 2, 2013

### Benefits

#### Special Benefits

- Logo on conference brochure– provided to 20,000 estate planning professionals in the United States (commitment must be received by April 26, 2013 to take advantage of this benefit)
- Only one sponsor accepted for this offering
- Right of first refusal for 2014 conference participation as the Continuing Education Credit Sponsor (commitment must be received by December 31, 2013 to take advantage of this benefit)
- Company logo placed on “information for attendee” sheet supplied to continuing education credit seekers at conference
- Opportunity to participate as the Name Badge Sponsor at a reduced fee (\$3000)

#### Conference Participation

- 8 full conference registrations
- Expanded exhibition space (if desired) – *see page 12 for add'l exhibitor details*

#### Pre and Post-Conference Public Relations

- Listed on all NAEPC conference-related communications prior to conference
- Logo on NAEPC website with a link to company website
- **Extra benefit!** Logo placement on the online publication *NAEPC Journal of Estate & Tax Planning* from the time of commitment through April 30, 2014 ([www.naepcjournal.org](http://www.naepcjournal.org))
- Pre & post-conference list of postal mailing addresses for registered attendees

#### On-Site Conference Public Relations

- Full-page ad in conference binder
- Continual recognition from podium during conference
- Logo included on banner displayed on site during conference
- Opportunity to insert take away item into conference registrant “goodie bag”

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## Conference Binder Sponsorship

Your company logo will be placed on the front of the conference book and compact disk distributed to all registered Council Leadership and Technical Education attendees. *This benefit is shared with the Anniversary Sponsor for the 50<sup>th</sup> Annual Conference.*

Commitment Level	\$10,000
Payment Terms	\$5,000 due with commitment form Balance paid by August 2, 2013

## Benefits

### Special Benefits

- Logo on conference brochure– provided to 20,000 estate planning professionals in the United States (commitment must be received by April 26, 2013 to take advantage of this benefit)
- Only one sponsor accepted for this offering

### Conference Participation

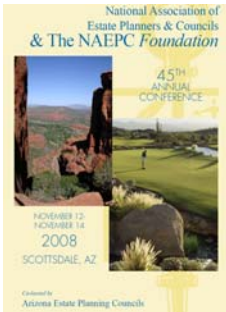
- 2 full conference registrations
- Tabletop exhibition space (if desired) – *see page 12 for add'l exhibitor details*

### Pre and Post-Conference Public Relations

- Listed on all NAEPC conference-related communications prior to conference
- Logo on NAEPC website with a link to company website
- **Extra benefit!** Logo placement on the online publication *NAEPC Journal of Estate & Tax Planning* from the time of commitment through April 30, 2014 ([www.naepcjournal.org](http://www.naepcjournal.org))
- Pre & post-conference list of postal mailing addresses for registered attendees

### On-Site Conference Public Relations

- Full-page ad in conference binder
- Recognition from podium during conference
- Logo included on banner displayed on site during conference
- Opportunity to insert take away item into conference registrant “goodie bag”



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## **Conference Shirt Sponsorship**

Your company logo will be placed on the sleeve of the conference golf shirt.

Commitment Level	\$10,000
Payment Terms	\$5,000 due with commitment form Balance paid by August 2, 2013

### **Benefits**

#### Special Benefits

- Logo on conference brochure– provided to 20,000 estate planning professionals in the United States (commitment must be received by April 26, 2013 to take advantage of this benefit)
- Only one sponsor accepted for this offering

#### Conference Participation

- 3 full conference registrations
- Tabletop exhibition space (if desired) – *see page 12 for add'l exhibitor details*

#### Pre and Post-Conference Public Relations

- Listed on all NAEPC conference-related communications prior to conference
- Logo on NAEPC website with a link to company website
- **Extra benefit!** Logo placement on the online publication *NAEPC Journal of Estate & Tax Planning* from the time of commitment through April 30, 2014 ([www.naepcjournal.org](http://www.naepcjournal.org))
- Pre & post-conference list of postal mailing addresses for registered attendees

#### On-Site Conference Public Relations

- Full-page ad in conference binder
- Recognition from podium during conference
- Logo included on banner displayed on site during conference
- Opportunity to insert take away item into conference registrant “goodie bag”

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### **Name Badge Sponsorship**

Your company logo will be placed on the name badge holder that is distributed to all registered attendees.

Commitment Level	\$5,000
Payment Terms	\$full payment due with commitment form

### **Benefits**

#### **Special Benefits**

- Printed company name on conference brochure– provided to 20,000 estate planning professionals in the United States (commitment must be received by April 26, 2013 to take advantage of this benefit)
- Only one sponsor accepted for this offering

#### **Conference Participation**

- 1 full conference registration

#### **Pre and Post-Conference Public Relations**

- **Extra benefit!** Logo placement on the online publication *NAEPC Journal of Estate & Tax Planning* from the time of commitment through April 30, 2014 ([www.naepcjournal.org](http://www.naepcjournal.org))
- Pre & post-conference list of postal mailing addresses for registered attendees

#### **On-Site Conference Public Relations**

- Full-page ad in conference binder
- Recognition from podium during conference
- Logo included on banner displayed on site during conference
- Opportunity to insert take away item into conference registrant “goodie bag”

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# EXHIBITOR

- Commitment Level     \$1,250  
Space is limited and available first come, first served with priority given to diamond, platinum, gold, silver and alternative sponsors.
- Payment Terms         Full payment due with commitment form

## Benefits

### Conference Participation

- 1 full conference registration  
Additional registrants from exhibiting company may be registered for a fee of \$350 (including those that will staff the exhibit booth only)  
**Registration sharing is not permitted**
- All meals and breaks will be in exhibit area

### Pre and Post-Conference Public Relations

- Pre & post-conference list of postal mailing addresses for registered attendees

### On-Site Conference Public Relations

- Half-page ad in conference binder

## Basic Exhibitor Information

Show Hours (during meal and break periods). A specific schedule will be released in the sponsor/exhibitor kit.

- Wednesday, November 20, 2013 · 12:00 noon – 7:00 pm  
A Welcome Reception will take place within the exhibit hall on Wednesday, November 20, 2013 from 5:00 pm – 7:00 pm.
- Thursday, November 21, 2013 · 7:30 am – 5:00 pm
- Friday, November 22, 2013 · 7:30 am – 1:30 pm

\*All exhibitors must be set up by 11:30 am on Wed., November 20, 2013

### On-Site Accommodations

- One 6 ft. skirted table
- One chair per registrant
- Wastebasket
- Identification sign
- Fully carpeted

### Display Guidelines

- Due to space limitations, only tabletop displays will be permitted (with the exception of anniversary, diamond, platinum and continuing education credit sponsors). This policy is strictly enforced.

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# ADVANTAGE SPONSORSHIPS .

## *Sponsor Bonus Session Information*

**Sponsor Bonus Sessions are provided as a way for those organizations supporting the annual conference\* to enrich the educational experience of the 50<sup>th</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 21, 2013 and Friday, November 22, 2013 (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 15 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, 2013 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 any Sponsor Bonus Session for credit, hosting companies are encouraged to do so to the extent that they are able. The hosting company is completely 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, 2013 will be promoted to the best of NAEPC's abilities online and in print.

Anniversary, Platinum, Diamond, and Gold sponsors are eligible to host a Sponsor Bonus Session.

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

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## 50<sup>th</sup> ANNUAL CONFERENCE SPONSOR / EXHIBITOR COMMITMENT

Commitment Level	Amount	Exhibit Space	Host Bonus Session? (application req'd, pg 15)
Anniversary Sponsor Opt in to Name Badge (\$3,000) Yes / No Opt in to Conference Shirt (\$7,500) Yes / No	\$25,000	Yes / No	Yes / No
Diamond Sponsor Opt in to Name Badge (\$3,000) Yes / No	\$15,000	Yes / No	Yes (add'l fee) / No
Platinum Sponsor Opt in to Name Badge (\$3,000) Yes / No	\$10,000	Yes / No	Yes (add'l fee) / No
Gold Sponsor	\$5,000	Yes / No	Yes (add'l fee) / No
Silver Sponsor	\$2,500	Yes / No	NA
Continuing Education Credit Sponsor Opt in to Name Badge (\$3,000) Yes / No	\$25,000	Yes / No	NA
Conference Binder Sponsorship	\$10,000	Yes / No	NA
Conference Shirt Sponsor	\$10,000	Yes / No	NA
Name Badge Sponsorship	\$5,000	N / A	NA
Exhibitor	\$1,250	Yes	NA

**Company Contact Information (please print clearly or type)**

**PRINT COMPANY NAME EXACTLY AS IT SHOULD APPEAR ON ALL MATERIAL**

Contact Name \_\_\_\_\_  
 Telephone # \_\_\_\_\_ E-Mail \_\_\_\_\_  
 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):

Accounting                       Financial Planning                       Life Settlements  
 Banking                               Insurance                               Trust Services  
 Business Valuation                       Law                               Other: \_\_\_\_\_

**Promotional Item Contact Information**

Company Name \_\_\_\_\_  
 Contact Name \_\_\_\_\_  
 Telephone # \_\_\_\_\_ E-Mail \_\_\_\_\_  
 Address \_\_\_\_\_  
 City, State & Zip Code \_\_\_\_\_

\$\_\_\_\_\_ check payable to "The NAEPC Education Foundation"  
*\*only diamond, platinum and select alternative sponsorship payments may be deferred*

**OR**

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

Signature \_\_\_\_\_



# ADVANTAGE SPONSORSHIP .

## *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 Name \_\_\_\_\_

Telephone # \_\_\_\_\_ E-Mail \_\_\_\_\_

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 \_\_\_\_\_

Direct inquiries about sponsoring this event to Ed Socorro

[esocorro@NAEPCmarketing.org](mailto:esocorro@NAEPCmarketing.org) / (312) 600-5303

1120 Chester Ave., Ste. 470 ~ Cleveland, OH 44114-3514

(866) 226-2224 ~ fax (216) 696-2582 ~ [conference@naepc.org](mailto:conference@naepc.org)

# The NAEPC Education Foundation / NAEPC

## *Sponsor & Exhibitor Rules and Regulations*

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### ***1. 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.

### ***2. 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.

### ***3. Cancellation Policy ~***

All sponsor / exhibitor commitments are non-refundable.

### ***4. 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.

### ***5. 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.

### ***6. Dismantling ~***

No booth may be dismantled until the time noted within the final sponsor/exhibitor kit. Any exhibitor that begins dismantling before this time will revoke their right to exhibit at any future NAEPC/The NAEPC Education Foundation conference.

### ***7. 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.

### ***8. 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, dinners, hospitality suites or alternative transportation to off-site conference related events. Any sponsor / exhibitor deemed to have scheduled a competing event will 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.

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## ***9. 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.

## ***10. 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 attached page for a full copy of mailing list guidelines.

## ***11. Programming ~***

Sponsors / exhibitors may not conduct promotional educational programming including lectures, demonstrations or audiovisual presentations during conference programming hours.

## ***12. 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.

## ***13. 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.

## ***14. Staffing ~***

A company representative must be in attendance at the exhibit booth during the hours the exhibit hall is open.

## ***15. 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.



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# The NAEPC Education Foundation / NAEPC

## *Mailing List Usage Policy*

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All sponsors and exhibitors are entitled to one pre-conference and one post-conference mailing list for use in promoting their attendance at the annual conference.

The following guidelines apply to usage of these lists. By accepting delivery of each list, a sponsoring or exhibiting company agrees to the terms outlined below.

1. Attendee names and addresses may be used only for mailing purposes and may not be used for telephone or personal contact.
2. 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 “50 Annual Conference” of NAEPC and The NAEPC Education Foundation.
3. 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.
4. Any post-conference mailing must take place within sixty (60) days of receipt of the list.
5. 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.
6. User agrees to forward within thirty (30) days following receipt, any letters 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.
7. The user is solely responsible for determining that the information provided is sufficiently accurate for the user's purposes.