

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

*with Pre-Conference Sessions for  
Estate Planning Council Leaders*

**COLLABORATION · EDUCATION**



November 5 - 8, 2019

**THE COSMOPOLITAN  
OF LAS VEGAS**

Las Vegas, Nevada

**SPONSOR & EXHIBITOR PROSPECTUS**

**EARLY BIRD INCENTIVES - COMMIT BY JANUARY 31, 2019**

10% Returning Supporter Discount / 5% New Supporter Discount

Returning Supporters, Upgrade Level of Support from 2018 for an Additional 5% Discount!



# MATRIX OF OPPORTUNITIES

	<b>PREMIER</b> <small>(page 5)</small>	<b>PARTNER</b> <small>(page 6)</small>	<b>PRINCIPAL</b> <small>(page 7)</small>	<b>EXHIBITOR</b> <small>(page 8)</small>	<b>SPONSOR YOUR WAY</b> <small>(page 3)</small>
	<b>\$19,500</b>	<b>\$14,500</b>	<b>\$8,500</b>	<b>\$2,700</b>	<b>\$4,650</b>
Included Registrations	6	5	4	2	2
Discipline Exclusivity & Right of First Refusal for 2019	•				↑
Airline Reimbursement for Two	•				
General Session Presentation During Main Conference <i>(limit 2)</i>	•				
Present Webinar for NAEPC Members During Year of Support <i>(limit 2 per level of support)</i>	•	•			
Invitation to Attend Private Awards Breakfast	•				
Complimentary Speaker Introduction, General Session	•	•			
Reception Sponsorship	Tuesday	Wednesday			
Overnight Accommodations for Two Rooms, Two Nights	•	•			
Logo/Hyperlink in Newsletter, <a href="#">NAEPC News</a>	•	•			
Expanded Exhibition Space	•	•	•		
General Session Visual Recognition During Attendee Arrival	•	•			
Company Logo on Full Version of Registration Materials	•	•	•		
Provide Lanyard for Conference Attendees			first committed		
Logo on Cover of Registrant Materials	•	•	•		
Premium Exhibit Booth Placement	•	•			
Logo on Attendee Bag	•	•	•		
Verbal Recognition from Podium	•	•	•		
Logo/Hyperlink on <a href="#">NAEPC Journal of Estate &amp; Tax Planning</a>	•	•	•		
Conference Attendee Mailing List	pre & post	pre & post	pre & post	pre only	
Insert Item into Attendee Bag	•	•	•	•	
Speaker Introduction (Fee Applies)	-	-	opt-in	opt-in	
Sponsor Bonus Session (Fee Applies)	-	opt-in	opt-in		
Logo on Conference Signage	•	•	•		
Recognition/Hyperlink in Conference Messages to Attendees	logo	logo	logo		
Ad in Registrant Materials	full page	full page	full page	half page	
	<i>Learn more by turning to...</i>	<b>PAGE 5</b>	<b>PAGE 6</b>	<b>PAGE 7</b>	<b>PAGE 8</b>
					Choose from a list of options based on what fits your needs and goals best! ↓ <b>PAGE 3</b>

# • SPONSOR YOUR WAY

# \$4,650

The “Sponsor Your Way” option allows conference supporters to choose the benefits that are most meaningful to their firm from the list below. *Standard benefits of Sponsor “Your Way” include:*

- 2 full conference registrations
- Access to the pre- and post-conference lists of attendee postal mailing addresses for use in notifying attendees of your presence at the event and one-time follow up *(see page 11 for information governing usage of list)*
- Standard exhibition table (one 6 ft. table)
- Full-page ad in the registrant materials
- Company insert in the attendee welcome bag
- Choose **FIVE** preferred benefits from the list below



Enhance your presence with Attention-Grabbers; see pg. 4 for details.

*Please indicate **FIVE** preferred benefits below and submit with your commitment form. Check if completing electronically, circle if printing the document.*

Expanded exhibition space (10 ft.) **OR** Premium booth placement (please chose only one)

Standard electrical in exhibit booth

Logo/hyperlink on [NAEPC News](#) newsletter from time of commitment through December 31, 2019

Logo/hyperlink on [NAEPC Journal of Estate & Tax Planning](#) from commitment through December 31, 2019 *(sample at right)*

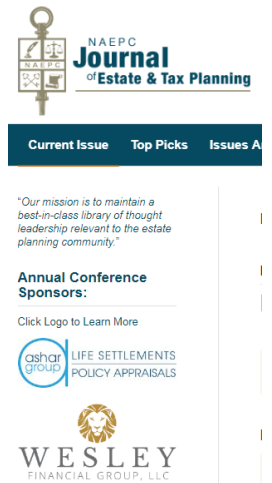
Speaker introduction of a general or breakout session speaker

Printed name / hyperlink on all conference messages & confirmations

One additional full conference registration that can be used for either a company representative or offered as a gift

Reimbursement of two nights of standard lodging (room & tax charges only) for one company representative at the conference hosting property

Invitation for up to two company representatives to attend the private NAEPC Board of Directors Awards breakfast on a date to be determined (or equivalent event, should schedule change)



## BECOME A SPONSOR BONUS SESSION PROVIDER • *additional \$2,500*



By opting in, you are able to host an attendee-appropriate *Sponsor Bonus Session* on either Wednesday or Thursday morning. See page 14 for additional details!

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

*\*Bonus Sessions are available first committed, first confirmed with priority given to those companies that provided a session the prior year.*

# • ATTENTION-GRABBERS

The below opportunities are available to registered sponsors and exhibitors or “Remote Supporters”, those who are unable to be on-site at the program.

Option	Description	Sponsor/ Exhibitor	Remote*
<b>Wifi</b> <i>2 sponsors accepted</i>	Your support includes logo placement on the instruction card each attendee receives at registration and on conference signage and logo on the landing page attendees reach after logging in. <i>hyperlink included if available</i>	\$4,000	\$6,000
<b>Guestroom Keycard</b> <i>1 sponsor accepted</i>	Showcase your company to attendees at check-in and through their stay with prominent branding and exclusivity. Company-supplied graphic will be placed on one side of the guestroom keycard.	\$5,500	not available
<b>Green Water Stations</b> <i>1 sponsor accepted</i>	Help us help the environment by sponsoring water stations provided in the general session and exhibit hall space from Wednesday - Friday. You provide a water bottle with your logo that gets distributed to each registrant as they check-in, NAEPC provides the water stations complete with a sign or “sleeve” on each cooler that shows your firm logo. <i>sleeve offered when available</i>	\$2,000	\$3,500
<b>Mid-Morning Coffee</b> <i>1 sponsor accepted</i>	Attendees will appreciate your sponsorship of the mid-morning coffee station, available following breakfast and up to the morning break from Wednesday – Friday. NAEPC will supply a sign on the coffee station that includes your logo.	\$1,500	\$2,500
<b>Breakfast</b> <i>1 sponsor accepted per day</i>	Help us prepare conference attendees for a day of learning by sponsoring a conference breakfast. NAEPC will supply a sign near the food stations that contains your logo.	\$1,750	\$3,000
<b>Lunch</b> <i>1 sponsor accepted per day</i>	Help us nourish conference attendees by sponsoring an exhibit hall luncheon. NAEPC will supply a sign near the food stations that contains your logo.	\$2,250	\$3,500
<b>Departure Snack Station</b> <i>1 sponsor accepted</i>	The conference program ends near noon on Friday, let’s work together to make sure that attendees have nourishment to travel home! Your sponsorship of the “departure snack station” includes signage with your logo.	\$2,350	\$4,000
<b>Luggage Storage</b> <i>1 sponsor accepted</i>	Signage provided within luggage storage area near conference facilities	\$500	\$1,000
<b>Power</b> <i>1 sponsor accepted</i>	Logo placement on signage near pods of power and on charging station in the general session space	\$1,500	\$2,500
<b>Notepad</b> <i>1 sponsor accepted</i>	You supply the notepads and NAEPC will make sure that they are at each place setting in the general session room at the beginning of each morning	\$750	\$1,500
<b>Pedometer</b> <i>1 sponsor accepted</i>	Interested in helping conference attendees track their steps each day? Each attendee will receive your firm-supplied pedometer at their place setting at the general session on Wednesday morning.	\$750	\$1,500
<b>Fun Run</b> <i>1 sponsor accepted</i>	Each year a group of conference attendees braves 5:45 am to participate in the NAEPC “Fun Run/Walk”. Help us provide them with a piece of fruit and water or sports drink and your firm-supplied tee shirt or other fitness-related item at the conclusion of the walk/run.	\$500	\$750
<b>Guestroom Delivery</b>	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 will be accepted Tue., Wed., and Thur. from different disciplines.</i>	\$1,500	\$3,500

**\* All Remote Supporters will have an opportunity to include an item in the registrant welcome bag and will receive printed name recognition on a Remote Supporter sign on-site.**

# • PREMIER

# \$19,500

The Premier Sponsorship is exclusive to one company in each of the following disciplines, offered first-come, first confirmed:

*Accounting · Appraisal · Banking / Trust Services · Financial Planning · Insurance · Legal*



**Enhance your presence with Attention-Grabbers; see pg. 4 for details.**

*Benefits include:*

- 6 full conference registrations that can be used for either a company representative or gifted
- Company logo/hyperlink in the NAEPC newsletter, [NAEPC News](#), through December 31, 2019 from the time of commitment
- Logo/hyperlink placement on the [NAEPC Journal of Estate & Tax Planning](#), the association's well-read online resource for professionals, from time of commitment through December 31, 2019
- Logo on full registration brochure when commitment is received on or before June 1, 2019
- Opportunity to present a webinar for NAEPC during the calendar year of support (application found on pg. 16 required with commitment form, content must be approved by NAEPC)
- Logo/hyperlink on all conference attendee messages and confirmations
- Access to the pre- and post-conference lists of attendee postal mailing addresses for use in notifying attendees of your presence at the event and one-time follow up (see page 11 for information governing usage of list)
- Standard coach airfare reimbursement for 2 company representatives to travel to and from the conference from anywhere in the United States (maximum value \$500 per ticket)
- Reimbursement of two nights of standard lodging (room & tax charges only) for two company representatives at the conference hosting property (NAEPC will move two rooms to the Master Account prior to the conference)
- Right of first refusal for the 57<sup>th</sup> Annual NAEPC Advanced Estate Planning Strategies Conference if commitment is received on or before December 31, 2019

*While attending the conference, Premier Sponsors will enjoy the benefit of:*

- Opportunity to present an attendee-appropriate general session during the main conference program (see page 13 for additional information) **Two available, offered first approved, first confirmed**
- Expanded and prominently-placed exhibition table (the equivalent of 20 ft. of space) – Additional exhibitor information can be found on page 8 of this document
- The most prominent company logo on all conference signage
- Verbal recognition daily from the podium
- Company logo displayed on the daily welcome screen as attendees enter the opening session
- Company logo placed on the cover of the materials each educational registrant receives
- Noted as the sponsor of the Tuesday Reception in the Exhibit Hall
- Ability to offer a two-minute speaker introduction of a nationally-known general session speaker
- Invitation for company representatives to attend the private NAEPC Board of Directors Awards Breakfast (date of breakfast to be determined - or equivalent event, should schedule change)
- Full-page ad in the registrant materials
- Logo placement on, and company insert in, the attendee welcome bag

# • PARTNER

# \$14,500

## Benefits include:

- 5 full conference registrations that can be used for either a company representative or gifted
- Company logo/hyperlink in the NAEPC newsletter, [NAEPC News](#), through December 31, 2019 from the time of commitment
- Logo/hyperlink placement on the [NAEPC Journal of Estate & Tax Planning](#), the association's well-read online resource for professionals, from time of commitment through December 31, 2019
- Logo on full registration brochure when commitment is received on or before June 1, 2019
- Logo/hyperlink on all conference attendee messages and confirmations
- Opportunity to present a webinar for NAEPC during the calendar year of support (application found on pg. 16 required with commitment form, content must be approved by NAEPC) – **limit 2 webinars, available first-committed, first confirmed**
- Access to the pre- and post-conference lists of attendee postal mailing addresses for use in notifying attendees of your presence at the event and one-time follow up (see page 11 for information governing usage of list)
- Reimbursement of two nights of standard lodging (room & tax charges only) for two company representatives at the conference hosting property (NAEPC will move two rooms to the Master Account prior to the conference)



While attending the conference, Partners will enjoy the benefit of:

Enhance your presence with Attention-Grabbers; see pg. 4 for details.

- Expanded and prominently-placed exhibition table (the equivalent of two standard 6 ft. table top booths) – Additional exhibitor information can be found on page 8 of this document
- Company logo on all conference signage
- Verbal recognition daily from the podium
- Noted as the sponsor of the Wednesday Reception in the Exhibit Hall
- Company logo displayed on the daily welcome screen as attendees enter the opening session
- Company logo placed on the cover of the materials each educational registrant receives
- Full-page ad in the registrant materials
- Logo placement on the attendee welcome bag
- Company insert in the attendee welcome bag
- Ability to offer a two-minute speaker introduction of a nationally-known general session speaker

## BECOME A SPONSOR BONUS SESSION PROVIDER • additional \$2,500



By opting in, you are able to host an attendee-appropriate *Sponsor Bonus Session* on either Wednesday or Thursday morning. See page 14 for additional details!

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

*\*Bonus Sessions are available first committed, first confirmed with priority given to those companies that provided a session the prior year.*

# • PRINCIPAL

# \$8,500

*Benefits include:*

- 4 full conference registrations that can be used for either a company representative or gifted
- Logo/hyperlink placement on the [NAEPC Journal of Estate & Tax Planning](#), the association's well-read online resource for professionals, from the time of commitment through December 31, 2019
- Logo on full registration brochure when commitment is received on or before June 1, 2019
- Logo/hyperlink on all conference attendee messages and confirmations
- Access to the pre- and post-conference lists of attendee postal mailing addresses for use in notifying attendees of your presence at the event and one-time follow up (see page 11 for information governing usage of list)

*While attending the conference, Principal sponsors will enjoy the benefit of:*

- Expanded exhibition space (10 ft.) – Additional exhibitor information can be found on page 8 of this document
- Company logo on all conference banner signage
- Verbal recognition daily from the podium
- Company logo placed on the cover of the materials each educational registrant receives
- Full-page ad in the registrant materials
- Logo placement on the attendee welcome bag
- Company insert in the attendee welcome bag



**Enhance your presence with Attention-Grabbers; see pg. 4 for details.**

*To enhance the value of participation, Principal sponsors may choose to:*

- Opt-in to provide a 2-minute introduction of a conference general or breakout session speaker – information to do so will be provided in the final sponsor/exhibitor kit (\$500 fee applies)
- Offer a Sponsor Bonus Session (fee applies, see below)
- Provide the lanyard all attendees will be provided with upon registration (Company has option of providing NAEPC with a double bulldog or no-twist lanyard or allowing NAEPC to order lanyard at company expense). **This opportunity is available first committed, first confirmed and cannot be shared among Principal sponsors.**

## **BECOME A SPONSOR BONUS SESSION PROVIDER • additional \$2,500**



By opting in, you are able to host an attendee-appropriate *Sponsor Bonus Session* on either Wednesday or Thursday morning. See page 14 for additional details!

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

*\*Bonus Sessions are available first committed, first confirmed with priority given to those companies that provided a session the prior year.*

# • EXHIBITOR

# \$2,700

*Benefits include:*

- 2 full conference registrations (additional representatives may be registered at the time the final sponsor kit is distributed in late summer, a \$300 per person fee applies)
- Access to the pre-conference list of attendee postal mailing addresses for use in notifying attendees of your presence at the event and one-time follow up (see page 11 for information governing usage of list)

*While attending the conference, Exhibitors will enjoy the benefit of:*

- Standard exhibition table (one 6 ft. table)
- Half-page ad in the registrant materials
- Company insert in the attendee welcome bag



**Enhance your presence with Attention-Grabbers; see pg. 4 for details.**

*To enhance the value of participation, Exhibitors may choose to:*

- Opt-in to provide a 2-minute introduction of a conference general or breakout session speaker – information to do so will be provided in the final sponsor/exhibitor kit (\$500 fee applies)

## GENERAL EXHIBITION INFORMATION •

Booth assignments are handled internally.

The exhibit hall is a “casual” set and does not utilize standard 10 x 10 booths walled off by pipe and drape.

### *Shipping & Receiving*

All sponsors and exhibitors are asked to ship their materials directly to the hotel; NAEPC does not use an exhibition company. Instructions will be provided in the final sponsor kit, which is distributed late summer.

### *Estimated Set-Up, Tear-Down, and Hall Hours (hours subject to change / adjustment)*

Set-up: Tuesday, November 5, 2019: 10:00 am – 4:30 pm

Tear-down: Thursday, November 7, 2019: 3:15 pm

The Exhibit Hall will be open during meal and break periods beginning after set-up and until the tear-down time. The receptions, all meals, and breaks will take place in the Exhibit Hall. A final schedule of events will be published in the full conference brochure and within the final sponsor kit.



### *On-Site*

Each fully-carpeted exhibitor area will be equipped with one 6 ft. dressed table, two chairs, a wastebasket, and an identification signage. Only table top displays are permitted (with the exception of Premier, Partner, Principal Sponsors, and “Your Way” sponsors that have chosen expanded space.)



*Retractable signage is acceptable when placed in a location that does not interfere with the flow of traffic and sight lines.*



# 56<sup>TH</sup> ANNUAL NAEPC ADVANCED ESTATE PLANNING STRATEGIES CONFERENCE COMMITMENT FORM & INVOICE ·

**Step 1; choose your level of support and desired add-on item:**

	Commitment Level	Amount	Exhibition Space	General Session? (application req'd, pg. 15)	Bonus Session? (application req'd, pg. 15)	Provide Lanyard?
	Premier Sponsor	\$19,500	yes / no	yes / no	-	-
	Partner Sponsor	\$14,500	yes / no	-	yes (fee required)	-
	Principal Sponsor	\$8,500	yes / no	-	yes (fee required)	yes / no
	Sponsor Your Way (submit pg. 3 with form)	\$4,650	yes / no	-	yes (fee required)	-
	Exhibitor	\$2,700	-	-	-	-
	Attention-Grabber (note preference)	\$ _____	-	-	-	-

**Step 2; tell us about your company:**

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



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

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

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

Address \_\_\_\_\_

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

Signature \_\_\_\_\_

*By signing above, I/we agree to comply with the rules & regulations outlined within pages 10 & 11 of the sponsorship packet.*

Our specialty is (check all that apply):

Accounting                       Financial Planning                       Software  
 Appraisal                               Insurance                               Other (please describe)  
 Banking / Trust Services                       Legal  
 Business Valuation                       Life Settlements

**Additional/Marketing Contact (this person will receive a copy of the sponsor kit and all pre-conference details and communication, including set-up/hall hours/shipping, etc.)**

Name \_\_\_\_\_

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

Address \_\_\_\_\_

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

**Step 3; provide payment details ...**

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 at the time commitment form is returned to NAEPC. Please retain a copy of this page as your receipt.

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

National Office: 1120 Chester Ave., Ste. 470 • Cleveland, OH 44114 • (866) 226-2224 • [conference@naepc.org](http://conference@naepc.org)

## RULES AND REGULATIONS •

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### ***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.

### ***Assignment of Exhibit Space •***

Assignment of space will be determined by the NAEPC. NAEPC reserves the right to rearrange the floor plan in the event of conflicts, either in advance of the conference or on-site.

### ***Cancellation Policy •***

All sponsor / exhibitor commitments are non-refundable.

### ***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 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.

### ***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.

### ***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 sponsor prospectus, 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.

### ***Functions/Supplemental 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. **An application to host a function can be obtained by sending an email to [conference@naepc.org](mailto:conference@naepc.org).**

### ***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.

### ***Mailing List •***

Sponsors / exhibitors are entitled to a list of registered attendees one month prior to the start of the conference and sponsors receive a post-conference list 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 below for a full copy of mailing list guidelines.

### ***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 Sponsor Bonus Sessions and Sponsor 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 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 US Mail and/or email.

### ***Staffing •***

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

### ***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.

## **MAILING LIST USAGE POLICY •**

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All sponsors and exhibitors receive one pre-conference mailing list of attendee addresses for use in promoting their attendance at the annual conference. Sponsors also receive a post-conference mailing list. By accepting delivery of either list, a sponsoring or exhibiting company agrees to the terms outlined below.

- Attendee names and addresses may be used only for mailing purposes and may not be used for telephone or email contact.
- 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 may reference their attendance at the "56<sup>th</sup> Annual NAEPC Advanced Estate Planning Strategies Conference".
- 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.
- Any post-conference mailing must take place within sixty (60) days of receipt of the list.
- 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 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.
- The user is solely responsible for determining that the information provided is sufficiently accurate for the user's purposes.

## ABOUT THE NATIONAL ASSOCIATION OF ESTATE PLANNERS & COUNCILS •

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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.

### EXCELLENCE IN ESTATE PLANNING

We are a national organization of over 2,000+ Accredited Estate Planner® designees, over 270 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 that the team approach to estate planning best serves the client.

## 56<sup>th</sup> ANNUAL CONFERENCE & LOCATION INFORMATION •

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The 3½ day conference program features one day devoted solely to affiliated local estate planning council leadership development. As such, the Tuesday, November 5, 2019 schedule provides educational sessions for leaders from the affiliated councils throughout the country. Approximately 130 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 philanthropic 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 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 •

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Sponsor and exhibitor arrangements will be confirmed when an executed commitment form has been received (page 9 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 10 and 11 of this document.

Conference attendee **postal mailing information** will be released one month prior to the start of the conference to sponsors and exhibitors and within 30 days of the conclusion of the conference to sponsors, both in an electronic format for one-time use in contacting registered participants. Email addresses are not available.

## GENERAL SESSION INFORMATION •

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**Sponsored sessions are provided as a way for those 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?*

One session will be offered during one time slot on Wednesday, November 6, 2019 and Thursday, November 7, 2019 (schedule is created by NAEPC.) **The sessions will be offered approved, first confirmed.**

*What does my company need to do to participate?*

The participating company must sponsor at the Premier level of support and agree to provide content that is educational and appropriate for the audience 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. Sales and marketing presentations are prohibited.

*What will NAEPC do to promote our session?*

Those companies that have applied and been approved to participate by March 31, 2019 will have information about their session included in both versions of the registration brochures. Please note that 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 (podium, microphone, screen, laptop, and projector).
- Complimentary conference registration for one (1) presenter\* for each session.

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

NAEPC will not provide reimbursement for speaker travel or lodging expenses outside of the reimbursement available as a part of the Premier support package. 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.

*What about Continuing Education Credit?*

Since the session is a part of the main conference, and multi-disciplinary credit is requested for the program, the sponsoring company and all presenters **must** adhere to all requests and deadlines with regard to CE filing. This will include 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 March 31, 2019 will be promoted to the best of NAEPC's abilities online and in print.

*Can we distribute printed material during/at the session?*

No, printed material cannot be distributed to attendees during or at the session.

*\*Registration is in addition to the 6 registrations that are furnished as a part of the benefits of the Premier level support.*

## BONUS SESSION INFORMATION •

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**Sponsor Bonus Sessions are provided for those organizations supporting the annual conference to enrich the educational experience of the attendees. Principal and “Your Way” Sponsors are eligible to opt-in to hosting a session.**

### *When are the sessions offered?*

These special sessions will be offered from 7:00 am – 7:45 am\* on the mornings of both Wednesday, November 6, 2019 and Thursday, November 7, 2019 (4 available, up to 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, appropriate for the audience, 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 March 31, 2019 will have information about their session included in both versions of the hard-copy registration brochures. 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 standard audio-visual equipment for the session (podium, microphone, screen, and projector). Speakers are asked to bring their own 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 an appropriate contact to make arrangements.
- Complimentary conference registration for one (1) presenter\*\* for each Bonus Session.

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

NAEPC will not provide reimbursement for speaker travel or lodging expenses outside of the reimbursement available as a part of the package associated with chosen level of support. 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 Session 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 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 March 31, 2019 will be promoted to the best of NAEPC’s abilities online and in print.

### *Can we distribute printed material during/at the session?*

No, printed material cannot be distributed to attendees during or at the session.

*\*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.*

# SPONSOR SESSION APPLICATION •

(USE FOR BOTH GENERAL AND BONUS SESSIONS)

We are applying for a \_\_\_ general session / \_\_\_ bonus session (choose one)

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

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

Contact Name \_\_\_\_\_

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

Address \_\_\_\_\_

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

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 \_\_\_\_\_

Please provide a current biography for the speaker(s).

Program Description (one paragraph) \_\_\_\_\_

Please attach a detailed outline and PowerPoint presentation for the program.

Do you have a preference with regard to the day of your session? Wednesday Thursday No Preference

*\*NAEPC will do its best to accommodate the preference noted above; programs will be assigned on a first committed/first confirmed basis in accordance with the conference schedule.*

**For Bonus Sessions Only:**

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 \_\_\_\_\_

*\*NAEPC is unable to file bonus sessions for continuing education credit. See page 14 for more information.*

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. Furthermore, I understand that NAEPC cannot guarantee a specific day for the presentation or attendance at my/our session.

Signature \_\_\_\_\_

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

# WEBINAR APPLICATION •

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

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

Contact Name \_\_\_\_\_

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

Address \_\_\_\_\_

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

Please provide information about your one-hour session below taking special care to note that the **information you include may be published in the marketing materials for the webinar** if program is accepted.

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

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

*Please attach a current biography for the speaker(s).*

Program Description (one paragraph) \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

*Please attach an outline and/or PowerPoint presentation for the program.*

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

1 \_\_\_\_\_

2 \_\_\_\_\_

3 \_\_\_\_\_

By signing below, I/we 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 webinar.

Signature \_\_\_\_\_

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