

57th Annual NAEPC
Advanced Estate Planning Strategies Conference

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

Collaborate · Educate · Cultivate



November 3 - 6, 2020

**MARRIOTT HARBOR BEACH
RESORT & SPA**

Ft. Lauderdale, Florida

SPONSOR & EXHIBITOR PROSPECTUS



STAND OUT FROM THE CROWD!

Learn about exclusive and cost-effective **Attention-Grabber** and **Technology Enhancement** opportunities that provide additional exposure – pages 4 and 5.

MATRIX OF OPPORTUNITIES	PREMIER	PARTNER	SPONSOR YOUR WAY	EXHIBITOR +	EXHIBITOR
COST OF ENTRY	\$21,500	\$11,500	\$4,950	\$2,900	\$1,900
Included Registrations	6	4	2	2	1
Attend Educational Sessions from Wednesday – Friday & Earn Continuing Education Credit	▪	▪	▪	▪	▪
General Session Presentation	▪				
Bonus Session Presentation – <i>space is limited</i>		Complimentary	Opt-in	n/a	n/a
Airline Reimbursement (coach airfare, two tickets at up to \$500 each)	▪				
Discipline Exclusivity for 2020	▪				
Right of First Refusal for 2021	▪				
Present or Sponsor Webinar During Calendar Year 2020 – <i>limited to two at each level of support for presentations, all others receive a sponsorship</i>	▪	▪			
Speaker Introduction, General Session	Complimentary	Complimentary		Opt-in	Opt-in
General Session Verbal & Visual Recognition	▪	▪			
Company Logo and Hyperlink on www.NAEPc.org/conference	▪	▪			
Overnight Accommodations at Host Hotel in Standard Guestroom	4 nights	2 nights			
Reception Sponsor	Wednesday	Tuesday			
Invitation for up to 2 to Attend Private Awards Breakfast	▪	▪			
Logo/Hyperlink in <i>NAEPC News & NAEPC Journal of Estate & Tax Planning</i> During Year of Support	▪	▪			
Exhibition Booth/Display Space	20 x 10	10 x 10		6 ft. tabletop	6 ft. tabletop
Upgrade to Full Content Listing in Event E-Book/Attendee Portal	Complimentary	Complimentary		Opt-in	Opt-in
Company Logo on Full Version of Registration Brochure	▪	▪			
Logo on Attendee Bag	▪	▪			
Number of Items in Attendee Welcome Bag	Up to 2	Up to 2		1	n/a
Pre- & Post-Conference Attendee List, Including Postal and Email Addresses (Rules govern the use of this list and information included within)	▪	▪		Pre- Only	n/a
Placement/Hyperlink in Conference Messages to Attendees	Logo	Logo			
Placement on Sponsor Bingo Card	▪	▪	▪	▪	n/a
Placement on On-Site Conference Signage	Logo	Logo	Logo	Name	Name
TO LEARN MORE, TURN TO...	Page 6	Page 7	Page 3	Page 8	Page 8

Choose your favorite benefits!

• SPONSOR YOUR WAY

\$4,950

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

- 2 full conference registrations
- Standard exhibition table (one 6 ft. table, display limited to table top size)
- Access to the pre-conference lists of attendee postal and email addresses for use in notifying attendees of your presence at the event and for planning approved private or invite-only events (*see page 12 for information governing usage*)
- Logo placement on signage
- One insert in the attendee welcome bag

Please check or circle your firm’s preferred benefits from the categories below and submit this page with your commitment form. Please choose carefully, choices cannot be shared among categories, nor can they be amended after the commitment form has been received.

BOOTH MANAGEMENT <i>Choose One</i>	ON-SITE OPERATIONS <i>Choose Two</i>	VISIBILITY <i>Choose Two</i>
Premium Booth Placement	Introduction of a General or Breakout Speaker <i>Currently wait-listed, please provide a 3rd choice</i>	Logo/Hyperlink within NAEPC News from Commitment through December 31, 2020
Expanded Exhibition Space <i>The equivalent of a 10 x 10 booth</i>	Overnight Accommodations for Two Nights <i>Room and Tax Charges Only, Standard Lodging at the Conference Host Hotel</i>	Logo/Hyperlink within NAEPC Journal of Estate & Tax Planning from Commitment through December 31, 2020
Standard Electrical Service	One Additional Conference Registration for a Company Representative or to be Gifted	Logo/Hyperlink within Conference Messages & Attendee Confirmations
	Second Item in Attendee Welcome Bag	Post-Conference Attendee List
		Upgrade to Full Content Listing in Event E-Book/Attendee Portal



Enhance your presence with Attention-Grabbers; see pgs. 4 and 5 for details.

BECOME A SPONSOR BONUS SESSION PROVIDER • additional \$2,900

By opting in, you are able to host an attendee-appropriate *Sponsor Bonus Session* on either Wednesday or Thursday morning (information on pg. 15; application found on pg. 16 and supplemental information required with commitment form, content must be approved by NAEPC). **Four bonus sessions are available during the conference, awarded first committed, first confirmed**



• ATTENTION-GRABBERS

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*
Lanyard <i>1 sponsor accepted</i>	Provide the lanyard all attendees wear throughout the conference <i>(Company has option of providing NAEPC with a double bulldog or no-twist lanyard or allowing NAEPC to order lanyard at their expense)</i>	\$2,000	\$4,000
Guestroom Keycard <i>1 sponsor accepted</i>	Showcase your company to attendees at check-in and throughout their stay with prominent branding and exclusivity. Company-supplied graphic will be placed on one side of the guestroom keycard.	\$5,500	n/a
Green Water Stations <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 at the NAEPC registration desk, 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
Mid-Morning Coffee <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 Tuesday – Friday. NAEPC will supply a sign at the coffee station that includes your logo.	\$1,500	\$2,500
Breakfast <i>1 sponsor accepted</i>	Help us prepare conference attendees for a day of learning by sponsoring the conference breakfasts. NAEPC will supply a sign near the food stations that showcases your logo.	\$1,750	\$3,000
Lunch <i>1 sponsor accepted</i>	Help us nourish conference attendees by sponsoring the exhibit hall luncheons. NAEPC will supply a sign near the food stations that highlights your firm logo.	\$2,250	\$3,500
Departure Snack Station <i>1 sponsor accepted</i>	The conference program ends near noon on Friday, let’s work together to make sure attendees have nourishment to travel home! Your sponsorship of the “departure snack station” includes signage with your logo.	\$2,500	\$4,250
Luggage Storage <i>1 sponsor accepted</i>	Signage provided within luggage storage area near conference facilities	\$500	\$1,000
Notepad <i>1 sponsor accepted</i>	You supply the notepads and NAEPC will make sure they are at each place setting in the general session room at the beginning of each morning	\$750	\$1,500
Fun Run <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 fruit and/or water or sports drink and your firm-supplied tee shirt or other fitness-related item at the conclusion of the walk/run.	\$500	\$750
Guestroom Delivery <i>Multiple accepted Tue., Wed., and Thur. from different disciplines</i>	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	\$1,500	\$3,500

*** All Remote Supporters have an opportunity to include one item in the registrant welcome bag and receive printed name recognition on signage.**

• TECHNOLOGY ENHANCEMENTS

Available to registered sponsors and exhibitors or “Remote Supporters,” (those who are unable to be on-site at the program).

General Options

Option	Description	Sponsor/Exhibitor	Remote
Wi-Fi <i>2 sponsors accepted</i>	Your support includes logo placement on the instruction card each attendee receive at registration, on conference signage, and the firm’s logo on the landing page attendees reach after logging in*. <i>*Landing page and/or hyperlink included only when available</i>	\$4,000	\$6,000
Power <i>1 sponsor accepted</i>	Logo placement on signage near pods of power in the general session space	\$1,500	\$2,500

E-Book / Attendee Portal Options

Marquee Sponsorship <i>3 sponsors accepted from different disciplines</i>	With Marquee Sponsorship of the ConferenceAdit attendee e-book and portal, every attendee will see all Marquee Sponsor logos on the log-in page and a rotating logo on interior pages of the portal. Since this is the ONLY location to access speaker and program materials, as well as an option to track attendance for continuing education purposes during the event, your firm will be front-and-center from start to finish, and its presence will live on for a year post-conference. Includes full content upgrade.	\$3,500	\$6,000
Full Content Upgrade <i>Unlimited</i>	Give your basic listing a facelift by uploading up to 10 documents and including a firm logo and contact details, both while being “green” and saving on shipping to the conference <i>*complimentary for Premier and Partner sponsors</i>	\$400	n/a

The screenshot shows the ConferenceAdit attendee portal interface. Red arrows point from the text labels to specific features on the page:

- Marquee Logo Placement:** Points to the Marquee Sponsors section on the left sidebar, which displays logos for Ashar Group and St. Jude Children's Research Hospital.
- Full Content Upgrade:** Points to the 'Materials' section at the top of the main content area.
- Basic Listing (Complimentary for all sponsors and exhibitors):** Points to the 'Your Way Sponsors, Exhibitors & Supporters' section, which lists Alliance Trust Company and Berkshire Settlements, Inc.

On the right side of the screenshot, there are two sponsor tiers:

- Premier Sponsors:** Includes the Ashar Group logo.
- Partner Sponsor:** Includes the Wesley Financial Group, LLC logo and the TRUSTS & ESTATES logo.

Direct inquiries about sponsorship opportunities to Ed Socorro • esocorro@NAEPCmarketing.org / (312) 600-5303
National Office: 1120 Chester Ave., Ste. 470 • Cleveland, OH 44114 • (866) 226-2224 • conference@naepc.org

• PREMIER

\$21,500

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 pgs. 4 and 5 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, 2020 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, 2020
- Logo/hyperlink on www.NAEPC.org/conference
- Logo on full registration brochure when commitment is received on or before June 1, 2020
- Opportunity to present a complimentary educational webinar or sponsor a webinar scheduled as a part of the [Robert G. Alexander Webinar Series](#) during the calendar year of support (application found on pg. 17 and supplemental materials required with commitment form for educational webinars, content must be approved by NAEPC) – **limit 2 educational webinars, available first-committed, first confirmed, others will be assigned a program from the Robert G. Alexander Webinar Series**
- Logo/hyperlink on all conference attendee messages and confirmations
- Access to the pre- and post-conference attendee lists for use in notifying attendees of your presence at the event and one-time follow up and for planning approved private or invite-only events (see page 12 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)
- Four nights of standard lodging (room & tax charges only) at the conference hosting property (NAEPC will move nights to the Master Account prior to the conference)
- Right of first refusal for the 58th Annual NAEPC Advanced Estate Planning Strategies Conference if commitment is received on or before December 31, 2020

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

- Opportunity to present an attendee-appropriate general session during the main conference program (information on pg. 14; application found on pg. 16 and supplemental information required with commitment form, content must be approved by NAEPC)
- Expanded and prominently-placed exhibition booth (the equivalent of 20 x 10 ft. of space) – Additional exhibitor/exhibit hall information can be found on page 9 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
- Noted as the sponsor of the Wednesday 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 (or equivalent event) on a date to be determined
- Logo placement on, and up to two inserts in, the attendee welcome bag
- Complimentary full content upgrade in attendee e-book/portal
- Bingo card placement

• PARTNER

\$11,500

This level of support is limited to six, non-discipline exclusive participants.

Benefits include:

- 4 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, 2020 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, 2020
- Logo/hyperlink on [www.NAEPC.org/conference](#)
- Opportunity to present a complimentary educational webinar or sponsor a webinar scheduled as a part of the [Robert G. Alexander Webinar Series](#) during the calendar year of support (application found on pg. 17 and supplemental information required with commitment form for educational webinars, content must be approved by NAEPC) – **limit 2 educational webinars, available first-committed, first confirmed, others will be assigned a program from the Robert G. Alexander Webinar Series**
- Logo on full registration brochure when commitment is received on or before June 1, 2020
- 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 and for planning approved private or invite-only events (see page 12 for information governing usage of list)
- Two nights of standard lodging (room & tax charges only) at the conference hosting property (NAEPC will move nights to the Master Account prior to the conference)

Educational Webinars
Wait-Listed; Sponsorship
Still Available

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

- Opportunity to present an attendee-appropriate bonus session (information on pg. 15; application found on pg. 16 and supplemental information required with commitment form, content must be approved by NAEPC) – **four bonus sessions are available during the conference and awarded first committed, first confirmed – Only 1 Remaining!**
- Expanded and prominently-placed exhibition table (the equivalent of a 10 x 10 booth) – Additional exhibitor/exhibit hall information can be found on page 9 of this document
- Company logo on all conference signage
- Verbal recognition daily from the podium
- Noted as a shared sponsor of the Tuesday Reception in the Exhibit Hall
- Company logo displayed on the daily welcome screen as attendees enter the opening session
- Logo placement on the attendee welcome bag
- Up to two company inserts in the attendee welcome bag
- Ability to offer a two-minute speaker introduction of a general session or breakout speaker
- Complimentary full content upgrade in attendee e-book/portal
- Bingo card placement



Enhance your presence with Attention-Grabbers; see pgs. 4 and 5 for details.

• EXHIBITOR +

\$2,900

Benefits include:

- 2 full conference registrations (additional representatives may be registered at the time the final sponsor logistics kit is distributed in late summer, a \$400 per person fee applies*)
- Access to the pre-conference attendee lists use in notifying attendees of your presence at the event and one-time follow up (see page 12 for information governing usage of list)

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

- Standard exhibition table (one 6 ft. table, booth limited to table top size)
- Company insert in the attendee welcome bag
- Printed firm name on signage
- Bingo card placement

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, based on availability)
- Upgrade the basic listing in the attendee e-book/portal to a full content listing (\$400 fee applies)



Enhance your presence with Attention-Grabbers; see pgs. 4 and 5 for details.

• EXHIBITOR

\$1,900

This level of support is limited to ten, non-discipline exclusive participants.

Benefits include:

- 1 full conference registration

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

- Standard exhibition table (one 6 ft. table, booth limited to table top size)
- Printed firm name on signage

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, based on availability)
- Upgrade the basic listing in the attendee e-book/portal to a full content listing (\$400 fee applies)

*Additional registrant fee subject to change

EXHIBITION INFORMATION •

Booth assignments are handled internally; a pre-conference floorplan is not published, but will be available to attendees within the E-Book / Attendee Platform once finalized.

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

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

Set-up: Tuesday, November 3, 2020: 9:30 am – 3:30 pm

Tear-down: Thursday, November 5, 2020: 3:05 pm

Estimated Hall Hours:

Tuesday, November 3, 2020	Wednesday, November 4, 2020	Thursday, November 5, 2020
SET-UP · 9:30 am – 3:30 pm	6:30 am – 8:00 am (breakfast)	6:30 am – 7:45 am (breakfast)
5:00 pm – 6:00 pm (reception)	10:30 am – 11:00 am (break)	10:00 am – 10:30 am (break)
	12:00 pm – 1:30 pm (lunch)	12:30 pm – 1:30 pm (lunch)
	3:30 pm – 4:00 pm (break)	2:35 pm – 3:05 pm (break)
	5:00 pm – 6:30 pm (reception)	TEAR-DOWN · 3:05 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.

THE EXHIBIT HALL IS NOT OPEN ON FRIDAY, NOVEMBER 6, 2020, BUT REPRESENTATIVES FROM SPONSORING AND EXHIBITING COMPANIES ARE WELCOME AND ENCOURAGED TO SPEND ADDITIONAL TIME WITH THE ATTENDEES BY ATTENDING THE EDUCATIONAL SESSIONS.

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 sponsor logistics kit, which is distributed late summer.

Next Steps

Late summer, all committed and fully-paid sponsors and exhibitors will receive the conference logistics kit, which contains information to register attendees and requests necessary to fulfill the benefits provided within your level of support.



On-Site



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

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

57TH ANNUAL NAEPC ADVANCED ESTATE PLANNING STRATEGIES CONFERENCE COMMITMENT FORM & INVOICE ·

Step 1; choose your level of support and desired add-on item(s):

Check Level	Commitment Level	Amount	Exhibition Space	General Session? (application req'd, pg. 16)	Bonus Session? (application req'd, pg. 16)
	Premier Sponsor	\$21,500	yes / no	yes / no	-
	Partner Sponsor	\$11,500	yes / no	-	
	Sponsor Your Way (submit pg. 3 with form)	\$4,950	yes / no	-	
	Exhibitor +	\$2,900	yes	-	-
	Exhibitor	\$1,900	yes	-	-
	Attention-Grabber/Tech Enhancement(s): _____	\$_____	-	-	-

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 11 & 12 of the sponsorship packet.

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	

Additional/Marketing Contact (this person will receive a copy of the sponsor logistics 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.
**THIS IS YOUR INVOICE
AND RECEIPT.**

RULES AND 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.

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.

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.

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.

Insurance & Liability •

Sponsor / exhibitor assumes entire responsibility and hereby agrees to protect, indemnify, defend, and save the NAEPC and its employees, independent contractors, and board of directors harmless against all claims, losses and damages to persons or property, governmental charges or fines and attorney's fees arising out of or caused by Exhibitor's transportation, installation, removal, maintenance, occupancy, display or use of exhibits, or of the exhibition premises or a part thereof, or for the conduct of or harm caused to attendees at any special supplemental event hosted by the sponsors/exhibitor, excluding any such liability caused by the sole negligence of NAEPC and its employees and board of directors.

Programming •

Sponsors / exhibitors may not conduct promotional or educational programming including lectures, demonstrations or audiovisual presentations during conference programming hours with the exception of approved 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 damage, deface, or destroy.

Shipping Instructions, AV, Electricity & Telephone Service •

Information regarding these items will be available to sponsors / exhibitors prior to the conference and will be distributed via US Mail and/or email.

Staffing and Behavior of Sponsor / Exhibitor Representatives •

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

MAILING LIST USAGE POLICY •

All sponsors and exhibitors will receive four pre-conference mailing lists of attendee contact details (name, designations, firm name, mailing address, email address and processing date) for use in promoting their attendance at the annual conference and/or the hosting of supplemental events*. These lists will be emailed to the sponsorship primary and marketing contact at 4, 3, 2 and 1 week(s) prior to the start of the program. Sponsors and Sponsor Your Way sponsors that opted in will also receive a post-conference attendee list. 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 “57th Annual NAEPC Advanced Estate Planning Strategies Conference”.
- User may use attendee contact information for an approved use once each time an attendee list is distributed (no more than a total of four email messages or mailings may be sent pre-conference and sponsors with access to a post-conference list can send one email message or mailing post-conference). The pre-conference lists may only be used pre-conference. 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. Any prohibited or unauthorized use by user shall constitute a material breach of the sponsorship agreement and may exclude company from participation in future years.
- 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.

*See rules and regulations addressing the hosting of supplemental events. Advance notice required.

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.

EXCELLENCE IN ESTATE PLANNING

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 that the team approach to estate planning best serves the client.

57th ANNUAL CONFERENCE & LOCATION INFORMATION •

The 3½ day conference program features one day devoted solely to affiliated local estate planning council leadership development. As such, the Tuesday, November 3, 2020 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 450. 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.

The Marriott Harbor Beach Resort and Spa is situated along a quarter-mile of private beach and provides tropical tranquility while offering easy access to Fort Lauderdale airport and top attractions including Las Olas Boulevard. Dive into the refreshing lagoon pool, take to the Atlantic for jet skiing or snorkeling, or pamper yourself at the full-service spa during off-program hours. When it's time to entertain, sponsors and exhibitors can savor innovative cuisine at one of the three on-property restaurants.

SPONSOR / EXHIBITOR INFORMATION •

Sponsor and exhibitor arrangements will be confirmed when an executed commitment form and payment has been received (page 10 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 11 - 12 of this document. Conference attendee mailing information will be released as stated within the mail list policy.

GENERAL SESSION INFORMATION •

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 4, 2020 and Thursday, November 5, 2020 (schedule is created by NAEPC.) **The sessions will be offered first 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 16 of this packet) along with the commitment form and supporting documents. Applications will be reviewed by NAEPC and a determination will be communicated within 30 days of receipt. 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, as are tactics designed to increase attendance, such as contests. At no time shall a general session provider be permitted to deny attendance to their session to any conference attendee.

What will NAEPC do to promote our session?

Those companies that have applied and been approved to participate by March 31, 2020 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 (one podium and microphone per presenter, 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, 2020 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 •

Sponsor Bonus Sessions are provided for those organizations supporting the annual conference to enrich the educational experience. “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 4, 2020 and Thursday, November 5, 2020 (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 16 of this packet) along with the commitment form and supporting documents. Applications will be reviewed by NAEPC and a determination will be communicated within 30 days of receipt. 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, as are tactics designed to increase attendance or sway attendees to choose one bonus session over another, such as contests. At no time shall a sponsor bonus session provider be permitted to deny attendance to their session to any conference attendee.

What will NAEPC do to promote our session?

Those companies that have applied and been approved to participate by March 31, 2020 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, 2020 will be promoted to the best of NAEPC’s abilities online and in print. Room Deliveries are available to promote your Bonus Session for a nominal fee (see Attention Grabber in prospectus; page 4).

Can we distribute printed material during/at the session?

Yes, you may.

**Timing subject to change.*

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

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 _____

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

Program Description (one paragraph) _____

REQUIRED ATTACHMENT: 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 •

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) _____

Knowledge Level (choose one) Basic Intermediate Advanced

Speaker Full Name & Professional Designations _____

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

Program Description (one paragraph) _____

REQUIRED ATTACHMENT: *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 NAEPCC cannot guarantee attendance at my/our webinar.

Signature _____

Title _____ Date _____