

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

Collaborate  
Educate  
Cultivate

November 10  
2020  
11:30 am – 5:00 pm ET

VIRTUAL  
SPONSORSHIP  
PROSPECTUS

# • *Be Part of Something Big*



## *A True Conference Experience that Goes Beyond Zoom •*

Join an estimated 700-900 registered attendees the afternoon of Tuesday, November 10, 2020 for NAEPCs first virtual learning conference. Complete with three nationally-known presenters, an exhibition hall, one-on-one networking opportunities, and the experience of an in-person conference without the expense of travel, the 57<sup>th</sup> Annual NAEPC Advanced Estate Planning Strategies Virtual Conference will provide the simplicity of an online event while maximizing the value of your sponsorship dollars. Plus, NAEPC will be making an exciting announcement during the conference. Don't get left behind – join us this November!

<i>Opportunities •</i>	Sponsor	Exhibitor
Cost of Entry	\$3,500	\$1,500
Booth & Attendee Registrations	Unlimited	Unlimited
Exhibitor Booth with Live Streaming, Firm Contact Information & Materials Upload	Large	Standard
Ability to Participate in Live Meetings with Attendees	✓	✓
Pre-Conference Attendee List with Email Addresses (One)	✓	✓
Post-Conference Attendee List with Email Addresses (One)	✓	✓
“Gamification” Component that Incentivizes Attendees to Visit the Exhibit Hall and Speak with Supporters	✓	✓
Lead Generation Details	✓	✓
On-Demand Program and Booths Available for 30 Days Post-Conference	✓	✓
Rotating Logo Placement in Conference Lobby	✓	
Largest and First Firms Noted in Exhibit Hall	✓	
Logo, Link & Opportunity to Provide 2-Minute Video Message for Posting on Conference Page of <a href="http://www.NAEPC.org">www.NAEPC.org</a>	✓	
Logo and Link in Sponsors Section of the <i>NAEPC Journal of Estate &amp; Tax Planning</i> through March 31, 2021	✓	
Logo and Link Placement in <i>NAEPC News</i> through March 31, 2021	✓	
Included in “Thank You” Post in NAEPCs General LinkedIn Group Once Each Month from Commitment through December 31, 2020	✓	

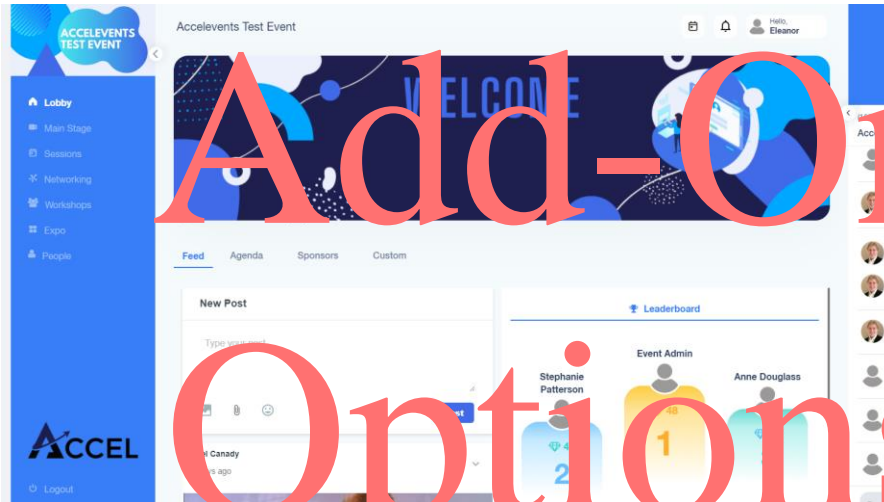
## Add-On Options

(Available only to registered sponsors and exhibitors)

### Logo Placement on Left Side of Page (One Available)

\$1,000

This option allows for your firm logo to appear on the left side of every page of the conference portal.



### Speaker Introduction with Logo in Presentation Window (Three Available)

\$500

One minute to introduce your firm and its services plus one minute to introduce the speaker, includes logo in the presentation window

- See page four for more information

### 30-Minute Bonus Session (Two Available)

\$1,500

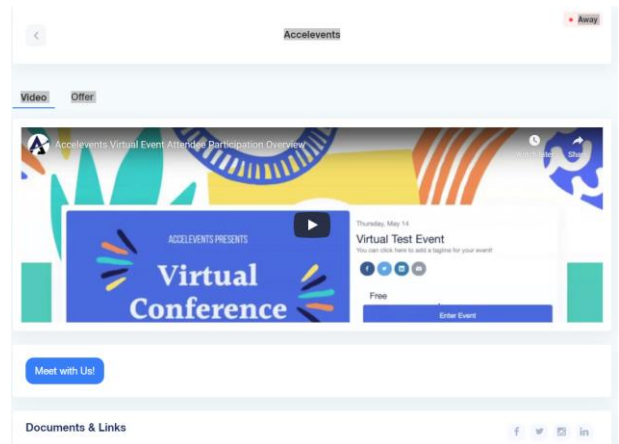
Host one of two concurrent educational sessions during the evening networking reception

- Presenter and content must be approved by NAEPC and is **required** with application (see page eight for session application)
- First committee, first awarded
- See pages four and eight for more information

## *Exhibition Information* ·

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

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



Sample Exhibit Booth

**Each exhibitor will be required to have their virtual booth fully-set up by close of business on Monday, November 2, 2020.**

## *Speaker Introduction Information* ·

A speaker introduction provides added visibility and may help to drive traffic to your booth within the exhibit hall. Three are available and will be randomly assigned. Participation allows your company two minutes at the podium, one minute to introduce your company and welcome attendees and one minute to offer an introduction of the speaker. Only one session will be awarded per company / conference.

## *Bonus Session Information* ·

Sponsor Bonus Sessions are available to sponsors and exhibitors and intended to enrich the educational experience of attendees. Two are available from 4:20 pm – 4:50 pm on Tuesday, November 10, 2020 and will take place concurrently with one another and the networking reception.

The sponsoring company must provide content that is timely and educational, appropriate for the audience, and must submit a complete application (page eight) with the commitment form along with all requested supporting documentation. **There are no exceptions to this requirement.** Applications will be reviewed by NAEPC and a determination will be communicated as promptly as possible. NAEPC reserves the right to deny any application. 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. “Gamification” points will be awarded for attendance. At no time shall a sponsor bonus session provider be permitted to deny attendance to their session to any conference attendee.

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

57<sup>TH</sup> ANNUAL NAEPC ADVANCED ESTATE PLANNING STRATEGIES  
VIRTUAL CONFERENCE

*Commitment Form & Invoice*

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

Check Level	Commitment	Amount
	Sponsor	\$3,500
	Exhibitor	\$1,500
	Add On: Logo Placement on Left Side of Page (one available)	\$1,000
	Add On: Speaker Introduction (three available)	\$500
	Add On: Bonus Session (two available) (Application and documents <b>REQUIRED</b> with application)	\$1,500

**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 all pre-conference details and communication.)**

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  
with commitment.

**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.

### ***Programming •***

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

### ***Staffing and Behavior of Sponsor / Exhibitor Representatives •***

A company representative must be in attendance at the exhibit booth during the hours the exhibit hall is open. Any sponsor / exhibitor representative or firm displaying inappropriate or aggressive behavior and/or sales tactics will be asked to leave immediately and may result in the removal of an exhibit or cancellation of a sponsorship with no refund of fees. Representatives must adhere to the NAEPC Event Conduct Statement: [www.naepc.org/content/conduct](http://www.naepc.org/content/conduct).

### ***Subletting Space •***

Subletting space is not permitted. Two or more firms may not exhibit in a single space unless arrangements have been approved by the NAEPC in advance.

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

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

## **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.

## MAILING LIST USAGE POLICY •

All sponsors and exhibitors will receive one pre- and one post-conference mailing list of attendee contact details (name, designations, firm name, mailing address, email address) for use in promoting their attendance at the annual conference. These lists will be emailed to the sponsorship primary and marketing contact one week prior to the start of the program and one week following the conclusion of the program. By accepting delivery of these lists, a sponsoring or exhibiting company agrees to the terms outlined below.

- NAEPC and National Association of Estate Planners & Councils names or logos may not be used on any material mailed by user. The sponsoring or exhibiting company **must** reference their attendance at the “57<sup>th</sup> Annual NAEPC Advanced Estate Planning Strategies Virtual Conference”.
- User may use attendee contact information for an approved use once each time an attendee list is distributed. The pre-conference lists may only be used pre-conference. 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 thirty (30) 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.

# 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 # \_\_\_\_\_ 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 \_\_\_\_\_

Educational Level (circle or check)    Basic        Intermediate        Advanced

One Paragraph Program Description

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## **REQUIRED ATTACHMENTS**

*Detailed outline **and** PowerPoint presentation for the program*

*Current Speaker Biography*

By signing below, I/we agree to comply with the rules & regulations outlined within the sponsorship packet. If my/our information is accepted, I agree that the subject matter will be appropriate to the audience, educational, not of a sales nature and not selling a product or service offered by my/our company, and will be an accurate reflection of what has been outlined within this page. Furthermore, I understand that NAEPC cannot guarantee attendance at my/our session.

Signature \_\_\_\_\_

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