

53rd Annual NAEPC
Advanced Estate Planning Strategies Conference
with Pre-Conference Sessions for
Estate Planning Council Leaders

COLLABORATION · EDUCATION

November 16 - 18, 2016

The Wigwam

Phoenix / Scottsdale, Arizona



**SPONSOR & EXHIBITOR
PROSPECTUS**

We are thrilled to offer a new level of support - "Sponsor Your Way"! This level of support allows you to choose the benefits that are most meaningful. Please see page 3 for a full description of the options.



MATRIX OF OPPORTUNITIES

	PREMIER (PAGE 4)	PARTNER (PAGE 5)	ASSOCIATE (PAGE 6)	EXHIBITOR PLUS (PAGE 7)	EXHIBITOR (PAGE 8)	YOUR WAY (PAGE 3)
	\$17,500	\$12,500	\$7,500	\$5,000	\$2,150	\$2,950 - \$3,800
Included Registrations	6	5	4	3	2	2
Discipline Exclusivity & Right of First Refusal for 2017	•					
Airline Reimbursement for Two	•					
Invitation to Attend the Awards Ceremony Private Breakfast	•					
Sponsor of Welcome Reception	•					
Complimentary Speaker Introduction, General Session	•					
Present Webinar for NAEPC Member Councils & Their Members	•					
Hold Breakout Session During Main Conference Program	•					
Company Mention on Full Version of Registration Materials	logo	logo	logo	printed name		
General Session Visual Recognition During Attendee Arrival	•	•				
Expanded Exhibition Table	•	•				
Logo / Hyperlink in Association Newsletter for Year of Support	•	•				
Overnight Accommodation Reimbursement for Two Rooms, Two Nights	•	•				
Provide Lanyard for Conference Attendees			•			
Logo on Cover of Registrant Materials	•	•	•			
Premium Exhibit Booth Placement	•	•	•			
Logo on Attendee Welcome Bag	•	•	•			
Verbal Recognition from Podium	•	•	•			
Logo / Hyperlink on NAEPC Journal of Estate & Tax Planning	•	•	•	•		
Conference Attendee Mailing List	pre & post	pre & post	pre & post	pre & post	pre	
Insert Item into Attendee Welcome Bag	•	•	•	•	•	
Optional Speaker Introduction (Fee Applies)		•	•	•	•	
Sponsor Bonus Session		included	opt-in	opt-in		
Logo on Conference Banner Signage	•	•	•	printed name		
Recognition in Conference Messages to Attendees	logo	logo	printed name	printed name		
Ad in Registrant Materials	full page	full page	full page	half page	half page	

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

• SPONSOR YOUR WAY

\$2,950 - \$3,800

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-conference attendee mailing list for use in notifying attendees of your presence at the event and one-time follow up (see page 16 for information governing usage of list)
- Standard exhibition table
- Half-page ad in the registrant materials
- Company insert in the attendee welcome bag

“Your Way” Selections

“Your Way” sponsors can choose one (\$2,950) or two (\$3,800) from each category below.

Please circle your preference of benefits below and submit this page with your commitment form.

CATEGORY ONE · EXHIBIT HALL

⌘ Expanded exhibition space

⌘ Standard electrical in booth

⌘ Premium booth placement

CATEGORY TWO · VISIBILITY

⌘ Logo and link on *NAEPC News* newsletter (one release)

⌘ Logo and link on *NAEPC Journal of Estate & Tax Planning* from time of commitment through year-end

⌘ Complimentary speaker introduction

⌘ Access to post-conference attendee list

⌘ Upgrade to full page ad in electronic attendee materials

CATEGORY THREE · ATTENDEE

⌘ One additional full conference registration

⌘ 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 Friday, November 18, 2016 (or equivalent event, should schedule change)

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• PREMIER

\$17,500

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

Accounting
Appraisal

Banking / Trust Services
Financial Planning

Insurance
Legal

Benefits include:

- 6 full conference registrations
- Company logo with hyperlink in the NAEPC newsletter, *NAEPC News*, for the entire calendar year of conference support from the time of commitment
- Logo and hyperlink placement on the *NAEPC Journal of Estate & Tax Planning*, the association's well-read online resource for professionals, for the entire calendar year of conference support from the time of commitment
- Logo on full registration brochure when commitment is received on or before June 1, 2016
- Opportunity to present a webinar for NAEPC during the calendar year of support (application found on pg. 13 required at time commitment form is received, webinar content must be submitted in advance and will be approved by NAEPC webinar committee)
- Logo recognition on all conference attendee messages and confirmations
- Access to the pre- and post-conference attendee mailing list for use in notifying attendees of your presence at the event and one-time follow up (see page 16 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 54th Annual NAEPC Advanced Estate Planning Strategies Conference if commitment is received on or before December 31, 2016

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

- 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
- The most prominent company logo on all conference banner 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 Wednesday evening Welcome Reception in the Exhibit Hall
- Ability to offer a two-minute speaker introduction of a nationally-known general session speaker
- Opportunity to present a breakout session during the main conference program (see page 9 for additional information)
- Invitation for company representatives to attend the private NAEPC Board of Directors Awards Breakfast on Friday, November 18, 2016 (or equivalent event, should schedule change)
- Full-page ad in the registrant materials
- Logo placement on the attendee welcome bag
- Company insert in the attendee welcome bag

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• PARTNER

\$12,500

Benefits include:

- 5 full conference registrations
- Company logo with hyperlink in the NAEPC newsletter, *NAEPC News*, for the entire calendar year of conference support from the time of commitment
- Logo and hyperlink placement on the *NAEPC Journal of Estate & Tax Planning*, the association's well-read online resource for professionals, for the entire calendar year of conference support from the time of commitment
- Logo on full registration brochure when commitment is received on or before June 1, 2016
- Logo recognition on all conference attendee messages and confirmations
- Access to the pre- and post-conference attendee mailing list for use in notifying attendees of your presence at the event and one-time follow up (see page 16 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:

- 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 banner 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
- Full-page ad in the registrant materials
- Logo placement on the attendee welcome bag
- Company insert in the attendee welcome bag
- Provide a 2-minute introduction of a conference speaker
- Opportunity to present a sponsor bonus session during the main conference program (see page 10 for additional information)

• ASSOCIATE

\$7,500

Benefits include:

- 4 full conference registrations
- Logo and link placement on the *NAEPC Journal of Estate & Tax Planning*, the association's well-read online resource for professionals, for the entire calendar year of conference support from the time of commitment
- Logo on full registration brochure when commitment is received on or before June 1, 2016
- Printed name recognition on all conference attendee messages and confirmations
- Access to the pre- and post-conference attendee mailing list for use in notifying attendees of your presence at the event and one-time follow up (see page 16 for information governing usage of list)

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

- Standard exhibition table with noticeable placement – 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

To enhance the value of participation, Associates may choose to:

- Opt-in to provide a 2-minute introduction of a conference 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.**

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



By opting in, you are able to host a *Sponsor Bonus Session* on either Thursday or Friday morning. See page 10 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 first to Premier Sponsors and second to those companies that provided a session the prior year.*

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esocorro@NAEPCmarketing.org / (312) 600-5303

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• EXHIBITOR PLUS \$5,000

Benefits include:

- 3 full conference registrations
- Logo and link placement on the *NAEPC Journal of Estate & Tax Planning*, the association's well-read online resource for professionals, for the entire calendar year of conference support from the time of commitment
- Printed company name on full registration brochure when commitment is received on or before June 1, 2016
- Printed name recognition on all conference attendee messages and confirmations
- Access to the pre- and post-conference attendee mailing list for use in notifying attendees of your presence at the event and one-time follow up (see page 16 for information governing usage of list)

While attending the conference, Exhibitor Plus Sponsors will enjoy the benefit of:

- Standard exhibition table – Additional exhibitor information can be found on page 8 of this document
- Company name on all conference signage
- Half-page ad in the registrant materials
- Company insert in the attendee welcome bag

To enhance the value of participation, Exhibitor Plus Sponsors may choose to:

- Opt-in to provide a 2-minute introduction of a conference 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)

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



By opting in, you are able to host a *Sponsor Bonus Session* on either Thursday or Friday morning. See page 10 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 first to Premier Sponsors and second to those companies that provided a session the prior year.*

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• EXHIBITOR

\$2,150

Benefits include:

- 2 full conference registrations (additional representatives may be registered, a \$300 per person fee applies)
- Access to the pre-conference attendee mailing list for use in notifying attendees of your presence at the event and one-time follow up (see page 16 for information governing usage of list)

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

- Standard exhibition table
- Half-page ad in the registrant materials
- Company insert in the attendee welcome bag

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

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

GENERAL EXHIBITION INFORMATION •

Shipping & Receiving

All sponsors and exhibitors will be asked to ship their materials directly to the hotel; NAEPC does not use an exhibition company.

Set Up & Tear Down

Set up: Wednesday, November 16, 2016 from 7:30 am – 11:30 am

Tear down: Immediately following lunch on Friday, November 18, 2016

Booth Assignments

All exhibitor booth assignments are handled internally.

Hall Hours

The 53rd Annual NAEPC Advanced Estate Planning Strategies Conference Exhibit Hall will be open during meal and break periods beginning with lunch on Wednesday, November 16, 2016, concluding after lunch on Friday, November 18, 2016. The Wednesday evening Welcome Reception will take place in the Exhibit Hall and offers an excellent opportunity to spend quality time with the conference attendees. All meals and breaks are served within the exhibit hall from set up to tear down. 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, one chair, a wastebasket, and an identification signage.

Display Guidelines

Due to space limitations, only table top displays are permitted (with the exception of Premier and Partner Sponsors.) Retractable signage, when placed in a location that does not interfere with traffic and sight lines, is acceptable.

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BREAKOUT SESSION INFORMATION

Sponsored breakout 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 from, 53rd Annual NAEPC Advanced Estate Planning Strategies Conference attendees.

When are the sessions offered?

Up to three breakouts will be provided during one time slot on either Thursday, November 17, 2016 or Friday, November 18, 2016 (schedule is created by NAEPC.) **The three sessions will be offered first come, 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 both timely and educational, and must submit a complete application (page 12 of this packet) along with the commitment form. Applications will be reviewed by NAEPC and a determination will be communicated within 30 days of receipt. Please note that NAEPC reserves the right to deny an application that is incomplete or does not meet the guidelines with regard to subject matter.

What will NAEPC do to promote our session?

Those companies that have applied and been approved to participate by April 1, 2016 will have information about their session included in the hard-copy registration brochure. 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 breakout, attendee must be registered in advance.

What About Continuing Education Credit?

Since the breakout session is a part of the main conference, and multi-disciplinary credit is requested for the program, sponsoring company must adhere to all requests and deadlines with regard to CE filing. This will include a full speaker biography, outline, completion of instructor registration forms, and various state filing forms. Failure to comply with these requests may be cause for cancellation of the breakout 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 breakout, 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 June 1, 2016 will be promoted to the best of NAEPC's abilities online and in print.

Breakout sessions are only available to Premier Sponsors.

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SPONSOR BONUS SESSION INFORMATION

Sponsor Bonus Sessions are provided as a way for those organizations supporting the annual conference* to enrich the educational experience for 53rd Annual NAEPC Advanced Estate Planning Strategies Conference attendees.

When are the sessions offered?

These special sessions will be offered from 7:00 am – 7:50 am on the mornings of both Thursday, November 17, 2016 and Friday, November 18, 2016 (4 available, 2 concurrent sessions each morning).

What does my company need to do to participate?

The sponsoring company must agree to provide content that is both timely and educational in nature, and must submit a complete application (page 12 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 June 1, 2016 will have information about their breakout session included in the hard-copy registration brochure. 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, attendee must be registered in advance.

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 June 1, 2016 will be promoted to the best of NAEPC's abilities online and in print.

A Bonus Session is included for Partner Sponsors. Associate and Exhibitor Plus Sponsors are eligible to opt-in to hosting a Sponsor Bonus Session.

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**53RD ANNUAL NAEPC
ADVANCED ESTATE PLANNING STRATEGIES CONFERENCE
SPONSOR / EXHIBITOR
COMMITMENT FORM & INVOICE ·**

Step 1; choose your level of support...

Commitment Level	Amount	Exhibition Space	Provide Breakout Session? (application req'd, pg 12)	Host Bonus Session? (application req'd, pg 12)	Provide Lanyard?
Premier Sponsor	\$17,500	yes / no	yes / no	n/a	n/a
Partner Sponsor	\$12,500	yes / no	n/a	yes (fee required)	n/a
Associate Sponsor	\$7,500	yes / no	n/a	yes (fee required)	yes / no
Exhibitor Plus Sponsor	\$5,000	yes / no	n/a	yes (fee required)	n/a
Sponsor Your Way – 2/category	\$3,800	yes / no	n/a	n/a	n/a
Sponsor Your Way – 1/category	\$2,950	yes / no	n/a	n/a	n/a
Exhibitor	\$2,150	yes	n/a	n/a	n/a

Step 2; please tell us about your company...

How should your company name appear in our materials?



Primary Contact Name _____

Telephone # _____ Email _____

Address _____

City, State & Zip Code _____

By signing below I/we agree to comply with the rules & regulations outlined within the sponsorship packet.

Signature _____

Title _____

Our specialty is (check all that apply):

- | | | |
|---|---|--|
| <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 | _____ |

Marketing / Promotional Information Contact Details (this person will receive a copy of the sponsor kit)

Company Name _____

Contact Name _____

Telephone # _____ Email _____

Address _____

City, State & Zip Code _____

Step 3; please provide payment details ...

Enclosed is our \$ _____ check payable to "The NAEPC Education Foundation"

Or

Bill credit card number _____ Exp. Date _____

Amount \$ _____ Name as it appears on card _____

Signature _____

<p>Full payment required at the time commitment form is returned to NAEPC.</p>
--

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SPONSOR SESSION APPLICATION · (USE FOR BOTH BREAKOUT AND BONUS SESSIONS)

We are applying for a ___ breakout 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 attach a biography for the speaker*

Program Description (one paragraph) _____

For Sponsor Bonus Sessions Only:

Do you have a preference with regard to the day of your session? Thursday Friday No Preference
**NAEPC will do its best to comply with the preference noted above, but will accommodate all programs on a first committed/first confirmed basis.*

Do you intend to provide continuing education credit for attendees? Yes No
If yes, please explain which disciplines and/or type of credit will be offered here _____

By signing below I/we agree to comply with the rules & regulations outlined within the sponsorship packet and 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 attendance at my/our session.

Signature _____

Title _____

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esocorro@NAEPCmarketing.org / (312) 600-5303

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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) _____

Speaker Full Name & Professional Designations* _____
**please attach a biography for the speaker*

Program Description (two paragraphs) _____

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 session.

Signature _____
Title _____

ABOUT NAEPC & THE NAEPC EDUCATION FOUNDATION •

The **National Association of Estate Planners & Councils** is a national organization of 1,900+ Accredited Estate Planner® and Estate Planning Law Specialist designation holders. Its 260 affiliated estate planning councils and their 29,000 members are focused on establishing and monitoring the highest professional and educational standards. NAEPC fosters public awareness of the quality services rendered by professionals who meet these standards.

The NAEPC Education Foundation was formed in 2005 to educate the public regarding the benefits of the team concept of estate planning. The organization's primary objective is to educate the public on what estate planning is, why it is so important, and how to develop a team of qualified estate planners to assist with their needs. This goal will be achieved through continuing education programs like the 53rd Annual NAEPC Advanced Estate Planning Strategies Conference, seminars, forums and meetings about estate planning for practicing professionals and through quality public estate planning day programs in communities throughout the United States. By supporting this conference, you are reaching far beyond the benefits associated with the event and are truly helping to fulfill the mission of The NAEPC Education Foundation.

Visit www.naepc.org for more information about either organization.

53RD ANNUAL CONFERENCE & LOCATION INFORMATION •

The 3-day conference program features one day devoted solely to affiliated local estate planning council leadership development. As such, the Wednesday, November 16, 2016 schedule is geared toward information 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 reach or exceed 500. Each participant is a professional who devotes a major portion of his or her practice and business to estate planning. The conference will draw attorneys, trust officers, accountants, insurance and financial planners, and planned giving professionals from across the country.

Deeply entwined with Arizona history, The Wigwam welcomes you to come make a little history of your own. Stretching over 440 lushly landscaped acres, our elegantly crafted adobe-and-timber luxury resort provides a rich palette of experiences to suit your every occasion-whether business, romance, relaxation or rollicking family fun. From dawn's first blush to the tangerine streaks of our Sonoran Desert sunsets, each day at The Wigwam is awash in endless possibilities. The hotel is located in Litchfield Park, Arizona, a short drive from Phoenix Sky Harbor International Airport.

SPONSOR / EXHIBITOR INFORMATION •

Sponsor and exhibitor arrangements will be confirmed when an executed commitment form has been received (page 11 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 15 and 16 of this document. Conference attendee postal mailing information will be released one month prior to the start of the conference and within 30 days of the conclusion of the conference, both in an electronic format for one-time sponsor / exhibitor use in contacting registered participants. Please note that email addresses are not available.

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RULES AND REGULATIONS •

Act of God •

In the case of cancellation of the conference, or unavailability of the exhibit hall, due to Acts of God, war, threats or acts of terrorism, governmental authority, fire, strike, labor disputes, or any other cause beyond the control of the NAEPC/The NAEPC Education Foundation, this agreement shall terminate, and the Association shall not be responsible for any damages or expenses incurred by the sponsor or exhibitor in connection therewith.

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 be permitted to interfere with another exhibit, impede access to another exhibit, use the space of another exhibit, or interfere with the free use of the aisle in front of any exhibit. All exhibit materials, including decorations, exhibit display, and audiovisual equipment must conform to fire regulations and electrical codes of the hotel. Exhibitors with audible electric devices, videos and other exhibits or devices, which might prove objectionable to other exhibitors, may be required to accept booth assignments that diminish reasonable objections.

Compliance •

These instructions and regulations have been formulated for the best interest of the sponsor / exhibitor. Failure to comply may result in removal of an exhibit or cancellation of a sponsorship with no refund of fees to the sponsor / exhibitor.

Dismantling •

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

Distribution of Printed Matter •

Except from within rented space, exhibitors and sponsors shall not distribute printed matter, samples, souvenirs, and the like. Distribution of materials elsewhere in the exhibit hall, general or breakout session space, in the hotel or on hotel property is not permitted.

Functions •

All functions scheduled by a sponsor / exhibitor during conference dates must be submitted in writing and pre-approved by the NAEPC/The NAEPC Education Foundation no less than 30 days prior to the start of the conference. This includes, but is not limited to, receptions, large group dinners, hospitality suites, or alternative transportation to off-site conference related events. Any sponsor / exhibitor deemed to have scheduled a competing event may revoke their right to participate in future NAEPC/The NAEPC Education Foundation conferences. Pre-paid sponsor / exhibitor fees will NOT be refunded. An application to host a function can be obtained by contacting NAEPC.

Insurance & Liability •

Sponsor / exhibitor assumes entire responsibility and hereby agrees to protect, indemnify, defend, and save the NAEPC/The NAEPC Education Foundation and its employees and board of directors harmless against all claims, losses and damages to persons or property, governmental charges or fines and attorney's fees arising out of or caused by Exhibitor's transportation, installation, removal, maintenance, occupancy, display or use of exhibits, or of the exhibition premises or a part thereof, 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/The NAEPC Education Foundation 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 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 Breakout 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 /The NAEPC Education Foundation in advance.

MAILING LIST USAGE POLICY •

All sponsors and exhibitors receive one pre- and one post-conference mailing list of attendee addresses for use in promoting their attendance at the annual conference. By accepting delivery of each 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, National Association of Estate Planners & Councils, and The NAEPC Education Foundation names or logos may not be used on any material mailed by user. The sponsoring or exhibiting company may reference their attendance at the “53rd 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.