

61st Annual NAEPC  
Advanced  
Estate Planning Strategies  
Conference

SPONSOR & EXHIBITOR  
PROSPECTUS



October 20 - 24, 2024  
Disneyland® Resort  
Anaheim, CA



Join  
**LEADERS** in  
the **ESTATE**  
**PLANNING**  
COMMUNITY.

## Sponsorship Opportunities At-a-Glance

## Attention Grabbers & Corporate Sponsorships Available See Pages 6 & 7

	Marquee	Premier	Enhanced Partner Your Way	Partner Your Way
	Page 3	Page 4	Page 5	Page 5
Cost of Entry	\$46,750	\$30,250	\$12,650	\$6,050
Discipline Exclusivity	shared with Premier	shared with Marquee		
Right of First Refusal for 2025 at Current Level of Support (by 12/31/24)	x	x		
Conference "All Access" Registrations	8	6	3	2
General Session Presentation (one per day accepted)	x	x		
2-Minute Video on NAEPC Website Conference Page with One Share in NAEPCs LinkedIn Group	x	x	available	
Complimentary Under-Door Delivery	x			
Educational Webinar for NAEPC Members During 2024 (limit three)	choice of one, one hour program or two, thirty-minute programs	one, one hour program		
Ask the Expert Area Near Exhibit Hall	x			
Exhibitor Bingo Card Placement & Opportunity to Donate Prize	x	x	available	available
Expanded Exhibition Space	x	x	available (10 ft)	
Preferred Exhibit Hall Placement	x	x	available	available
Hotel Key Card Sponsorship	x			
Lanyard Sponsorship	x			
Logo / Link on NAEPC News & NAEPC Journal of Estate & Tax Planning through 12/31/24	x	x	available	available
Logo / Link on NAEPC Website Conference Page	x	x	available	available
Logo / Link on All Conference Email & Confirmation Messages	x	x	available	available
Logo on CE/Materials Hub and Paper Attendance Tracking Forms	x			
Logo on Conference Signage	x	x	x	x
Logo on Council Leadership Conference Signage & Verbal Recognition during Learning Pods	x	x		
Placement in Materials Hub Sponsor Listing	x	x	x - available upgrade	x - available upgrade
Overnight Accommodations / Standard Room, Host Hotel	six nights	four nights	three nights available	
Pre- and Post-Conference Attendee List	with email	with email	postal mail - add email addresses available	postal mail - add email addresses available
President's Reception	sponsorship & invitation for eight	sponsorship & invitation for six	three tickets to attend available	
Reception Sponsorship	Sunday AND Monday	Sunday or Monday (assigned internally)		
Two-Minute Speaker Introduction	x	x	available	available
Verbal Appreciation from Podium	x	x		
30-Minute Bonus Workshop (7:15 am - 7:45 am, Monday or Tuesday)			available	additional fee
Attention Grabber Discount	10%	10%	10%	10%

## Exhibit Booth See Page 6

Regular: \$2,750

Includes one registration and a pre- and post-conference mailing list including postal mailing addresses.

Direct inquiries about sponsorship to  
Ed Socorro @ 312-600-5303 or [sponsorship@naepc.org](mailto:sponsorship@naepc.org).

NAEPC National Office  
2001 Crocker Rd., Ste. 510  
Westlake, OH 44145

866-226-2224 | [conference@naepc.org](mailto:conference@naepc.org)

# Marquee Sponsor | \$46,750

Direct inquiries about sponsorship to  
Ed Socorro @ 312-600-5303 or [sponsorship@naepc.org](mailto:sponsorship@naepc.org).

## MARQUEE-EXCLUSIVE BENEFITS

- |   |  |
|---|--|
| One Sponsor Accepted at this Level                          | Firm Logo on Lanyard                         |
| Sponsor of Guest Room Keycard (firm provides artwork)       | Discipline Exclusivity (shared with Premier) |
| Complimentary Under-Door Delivery (firm provides materials) | "Ask the Expert" Area Near Exhibit Hall      |

## GENERAL & PRE-CONFERENCE BENEFITS

- Present Educational Webinar for NAEPC Members during 2024 (limited to three sponsoring firms)
- Logo / Link on [NAEPC Journal of Estate & Tax Planning](#) and within [NAEPC News](#) through 2024
- Logo / Link on [Conference Webpage](#) and Attendee Registration Page
- 2-Minute Firm-Provided Video on [Conference Webpage](#) and NAEPC YouTube Channel with One-Time Share in [NAEPCs Primary LinkedIn Group](#)
- Pre- and Post-Conference Attendee List Including Email Addresses

## ATTENDANCE & ATTENDEE BENEFITS

- Eight Conference "All Access" Registrations, Including Most Meals
- Six Nights of Standard Overnight Accommodations at Host Hotel (room & tax only, standard guestroom)

## SPEAKING & RECOGNITION BENEFITS

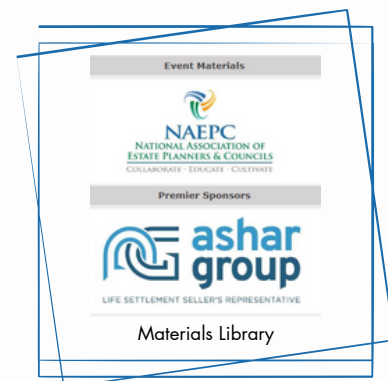
- 60-Minute General Session Presentation\* (up to three available, sessions are awarded first committed and approved, first placed when commitment is received by April 15th)
- Two-Minute Speaker Introduction for a General Session Presenter
- Verbal Appreciation from Podium

## CONTINUING EDUCATION BENEFITS

- Logo on Continuing Education Hub and Paper Check In/Out Vouchers

## TOP BILLING LOGOS & PLACEMENT

- Logo on Conference Signage
- Logo in Materials Library
- Preferred and Expanded Exhibit Hall Placement
- Included on Exhibit Hall Bingo Card (incentivizes attendees to visit your booth) and Opportunity to Contribute a Prize for the Drawing



## RELATED SPONSORSHIPS

- Council Leadership Conference (signage & verbal mention during all council leader activities)
- Signage at All Receptions Acknowledging Firm as Sponsor of Event
- Signage at the Tuesday evening\*\* President's Reception, plus Eight Invitations for Firm Representatives

## CONTINUING THE RELATIONSHIP

- Right of First Refusal for 2025 Marquee Sponsorship with Commitment by December 31, 2024
- Early Bird Discount for 2025 Participation



\*Application required; session must meet standards set forth within these materials and is subject to approval.

\*\*Takes place after exhibit hall tear-down

## GENERAL & PRE-CONFERENCE BENEFITS

- Discipline Exclusivity (multiple sponsors accepted from different professional disciplines)
- Present Educational Webinar for NAEPC Members during 2024 (limited to three sponsoring firms)
- Logo / Link on [NAEPC Journal of Estate & Tax Planning](#) and within [NAEPC News](#) through 2024
- Logo / Link on [Conference](#) Webpage and Attendee Registration Page
- 2-Minute Firm-Provided Video on Conference Webpage and NAEPC YouTube Channel with One-Time Share in [NAEPCs Primary LinkedIn Group](#)
- Pre- and Post-Conference Attendee List Including Email Addresses

## ATTENDANCE & ATTENDEE BENEFITS

- Six Conference "All Access" Registrations, Including Most Meals
- Four Nights of Standard Overnight Accommodations at Host Hotel (room & tax only, standard guestroom)

## SPEAKING & RECOGNITION BENEFITS

- 60-Minute General Session Presentation\* (up to three available, sessions are awarded first committed and approved, first placed when commitment is received by April 15th)
- Two-Minute Speaker Introduction for a General Session Presenter
- Verbal Appreciation from Podium

## LOGOS & PLACEMENT

- Logo in Materials Library
- Logo on Conference Signage
- Preferred and Expanded Exhibit Hall Placement
- Included on Exhibit Hall Bingo Card (incentivizes attendees to visit your booth) and Opportunity to Contribute a Prize for the Drawing

## RELATED SPONSORSHIPS

- Council Leadership Conference (signage & verbal mention during all council leader activities)
- Signage at One Evening Reception Acknowledging Firm as Sponsor of Event
- Signage at the Tuesday evening\*\* President's Reception, plus Six Invitations to Attend for Firm Representatives

## CONTINUING THE RELATIONSHIP

- Right of First Refusal for 2025 Premier Sponsorship with Commitment by December 31, 2024
- Early Bird Discount for 2025 Participation

\*Application required; session must meet standards set forth within these materials and is subject to approval.

\*\*Takes place after exhibit hall tear-down.

NAEPCs signature offering, Partner “Your Way”, allows conference supporters the flexibility to choose the benefits that are most valuable to their firm and is available at two levels.  
*Choices must be made at the time of commitment and cannot be changed.*

**STANDARD BENEFITS OF ENHANCED & REGULAR PARTNER YOUR WAY**

- |                                |   |
|--------------------------------|---|
| Six-Foot Exhibition Table      | Pre & Post Conference Attendee List (Postal Addresses Only) |
| Placement in Materials Hub     | Early Bird Discount for 2025 Participation                  |
| Firm Name in Materials Library |   |

**ADDITIONAL BENEFITS & CHOICES**

3 “All Access” Registrations, including Most Meals

**PLUS** Five Choices from the List Below  
*Submit this page with your commitment form.*

- One 30-Minute Educational Workshop\* (7:15 am on Monday or Tuesday, limited availability)
- Expanded Exhibition Space (sufficient space for a 10 ft. pop-up booth) & Premium Placement
- Logo / Link within NAEPC News Membership Newsletter & on the NAEPC Journal of Estate & Tax Planning (commitment through year-end)
- Logo / Link on Conference Webpage
- Placement on Exhibit Hall Bingo Card and an Opportunity to Contribute One Prize for Drawing
- ~~Two-Minute~~ **Sold Out** Speaker Introduction (includes a one-minute firm introduction)
- Logo / Link on Conference Email & Confirmation Messages
- Add Email Addresses to Attendee Lists
- Three Nights of Standard Overnight Accommodations at Host Hotel (room & tax only, standard guestroom)
- Invitation for Three to Attend the Tuesday evening President’s Reception
- 2-Minute Firm-Provided Video on Conference Webpage and NAEPC YouTube Channel with One-Time Share in NAEPCs Primary LinkedIn Group
- Upgrade to Logo in Materials Library

**ADDITIONAL BENEFITS & CHOICES**

2 “All Access” Registrations, including Most Meals

**PLUS** Four Choices from the List Below  
*Submit this page with your commitment form.*

- Premium Booth Placement
- Logo / Link within NAEPC News Membership Newsletter & on the NAEPC Journal of Estate & Tax Planning (commitment through year-end)
- Logo / Link on Conference Webpage
- Placement on Exhibit Hall Bingo Card and an Opportunity to Contribute One Prize for Drawing
- ~~Two-Minute~~ **Sold Out** Speaker Introduction (includes a one-minute firm introduction)
- Logo / Link on All Conference Email and Confirmation Messages
- Add Email Addresses to Attendee Lists
- Upgrade to Logo in Materials Library

**BONUS OPPORTUNITY**

Host a 30-minute educational workshop\* on Monday or Tuesday morning

\$3,900 Fee Applies

\*Application required; session must meet standards set forth within these materials and is subject to approval.

## Exhibitor I \$2,750

Direct inquiries about sponsorship to  
Ed Socorro @ 312-600-5303 or [sponsorship@naepc.org](mailto:sponsorship@naepc.org).

### STANDARD BENEFITS

1 "All Access" Registration\*, Including Most Meals  
Standard Six-Foot Exhibition Table  
Pre & Post Conference Attendee List (Postal Addresses Only)  
Early Bird Discount for 2025 Participation

\*Exhibitors can register additional attendees within the final logistics kit; a per-person fee will apply.  
**Every person staffing your firm's booth must be registered with NAEPC.**

## Corporate Supporter I \$1,500

Unable to sponsor or exhibit, but still want to support the association and its members? Become a corporate supporter, which provides signage recognition and one piece of your company provided-literature will be displayed on a shared "Corporate Supporter" table within the exhibit hall. Conference registrations are *not* included in this opportunity.

## Sponsored Social Events

Social events enhance the conference experience for attendees and provide sponsoring and exhibiting firms with an opportunity to spend time outside of the exhibit hall with those with whom they most align. NAEPC is interested in growing the number and type of supplemental events hosted by sponsoring and exhibiting firms during the Annual Advanced Estate Planning Strategies Conference. A visit to the theme park, group dinner at a Downtown Disney restaurant, special outings, dancing lessons, dessert reception, an early riser yoga class... the options are limited only by your firm's creativity. Events must take place outside of the official conference hours.

Small group dinners are exempt from the requirement of obtaining pre-approval.

Firms interested in hosting a social or supplemental event during the conference should submit the request form to [conference@naepc.org](mailto:conference@naepc.org) for consideration on or before September 29, 2024. Those firms that receive approval for their event will receive an additional attendee list with email seven days before the program for the sole use of inviting attendees. **This list may be used only once.**

Multiple sponsored events may take place at the same time.

## Attention Grabbers

Available to Sponsors, Exhibitors & Corporate Supporters

Sponsors Receive a 10% Discount

Up Close & Personal with Council Leaders <b>\$1,750</b>	Includes one ticket for breakfast, lunch, the morning educational sessions, and the Council Awards Ceremony on Wednesday, and one ticket to breakfast on Thursday morning. Council leader learning pods are not available to these individuals.
"Sweet Treats" at the President's Reception <b>\$3,500</b>	Your firm will be the sole sponsor of the coffee & dessert station at Tuesday evening's President's Reception - includes two tickets to attend
Grab & Go Bags <b>\$3,000</b> One Available	Your firm's logo will join Marquee & Premier sponsor logos on the conference attendee bag, which will be available to those who wish to take one at a "grab & go" station near the registration desk
Audio-Visual <b>\$1,500</b>	Logo on general session welcome screen for the entire conference
Guest Room Keycards <b>\$5,000</b> One Available	Showcase your company to attendees at check-in and through their stay with prominent branding and exclusivity. Your firm-supplied graphic will be placed on one side of the guestroom keycard.
Lanyard <b>\$3,500</b> One Available	Your logo prominently displayed around the neck of conference attendees will certainly bring brand awareness and the limelight. There's no better optic than conference attendees wearing your logo.
Power <b>\$1,000</b> One Available	Logo placement on signage near pods of power and on charging station in the general session space
Under-Door Delivery <b>\$1,500</b>	NAEPC will arrange for distribution of your firm-created and printed piece to each attendee under their guestroom door while they are away at sessions <small>Multiple sponsors from different disciplines accepted Sunday and Monday</small>
Mid-Morning Coffee <b>\$750</b>	Your firm's logo will be displayed on a sign near the coffee station that is available following breakfast and up to the morning break each day of the conference
Daily Breakfast & Lunch Sponsor <b>\$1,500</b>	Your firm's logo will be displayed on a sign near the buffets for one day of the conference  Monday or Tuesday; open to two firms / day

Direct inquiries about sponsorship to

Ed Socorro @ 312-600-5303 or [sponsorship@naepc.org](mailto:sponsorship@naepc.org).

The National Association of Estate Planners & Councils (NAEPC) cultivates excellence in estate planning by serving estate planning councils and their credentialed members, delivering exceptional resources and unsurpassed education, and recognizing those who hold the Estate Planning Law Specialist certification.

We are a national network of over 2,200+ Accredited Estate Planner® designees and 265 affiliated estate planning councils and their 28,000 credentialed members, all focused on establishing and monitoring the highest professional and educational standards. Our shared belief is that the team approach to estate planning best serves the client.

## EXCELLENCE IN ESTATE PLANNING

The conference features 2 ½ days of technical education (Monday, Tuesday, and 1/2 day on Wednesday) followed by two half-day sessions focused on best practices for leaders of affiliated councils throughout the country.

**Attendance is expected to reach or exceed 400, including a mix of attorneys, trust officers, accountants, insurance and financial planners, philanthropic professionals, sponsors, exhibitors, honorees, and guests.**

- All booth assignments are handled internally; a floorplan is not released pre-conference.
- Retractable signage / pop-up banners are permitted when placed in a location that does not interfere with the flow of traffic and/or sight lines, like behind your booth.
- Traditional displays are limited to table-top size (with the exception of Marquee, Premier, and Enhanced Partner Your Way sponsors that have chosen expanded space.)
- The exhibit hall utilizes tabletop exhibits rather than 10 x 10 booths separated by pipe and drape.
- Each exhibitor area will include one six-foot dressed table, two chairs, and a wastebasket.

## Inbound and Outbound Shipping of Booth Materials

Sponsors and exhibitors will ship materials directly to the hotel using their preferred carrier; NAEPC does not utilize an exhibition company. Instructions will be provided in the final sponsor logistics kit, which is distributed late summer.

## Set-Up, Tear-Down, and Hall Hours

NAEPC provides 11 hours of time with attendees at the conference during meal, break, and reception periods. The schedule of hall hours and events is shown below (subject to adjustment). *Those who dismantle before the published tear-down time may revoke the right to participate at future NAEPC programs.*

Sunday, October 20, 2024	Monday, October 21, 2024	Tuesday, October 22, 2024
<b>Set Up</b>   11:00 am – 3:30 pm	Breakfast   7:00 am – 8:00 am	Breakfast   7:00 am – 8:00 am
VIP Reception with NAEPC Board, Past Presidents & Estate Planning Council Leaders 4:00 pm – 5:00 pm	Break   9:30 am – 10:00 am	Break   9:25 am – 10:00 am
All-Attendee Reception 5:00 pm – 7:00 pm	Lunch   12:00 pm – 1:30 pm	Lunch   12:00 pm – 1:00 pm
	Break   3:30 pm – 4:00 pm	Break   3:00 pm – 3:30 pm
	All-Attendee Reception 5:00 pm – 6:30 pm	<b>Tear-Down</b>   3:30 pm

Take advantage of the open evenings by hosting events for attendees, especially on Tuesday after tear-down! See page 6 for more information.



## Step #1, Choose your Level of Support

	Marquee	Premier	Enhanced Partner Your Way	Partner Your Way	Exhibitor	Corporate Supporter
Cost of Entry	\$46,750	\$30,250	\$12,650	\$6,050	\$2,750	\$1,500
Select Your Primary Level of Support Here:				Bonus Workshop? Yes No (\$3,900 Fee)		
Attention Grabber Selection: _____						

In order to keep to important deadlines, the application and materials related to the educational session are **required** from Marquee, Premier, and "Your Way" Sponsors that have selected a Bonus Workshop at the time of commitment.

## Step #2, Your Firm's Details

**HOW SHOULD YOUR COMPANY NAME APPEAR IN OUR MATERIALS?** \_\_\_\_\_

**WEBSITE ADDRESS** \_\_\_\_\_

*\*Please be exact and make sure text is legible. This information, including the website address, will be used within program materials / links (for sponsors that receive website placement).*

What is your firm's primary discipline or specialty (check all that apply)

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

Contacts & Other Important Details

Primary Contact's Name \_\_\_\_\_

Primary Contact's Telephone \_\_\_\_\_ Primary Contact's Email \_\_\_\_\_

Address \_\_\_\_\_ City, State, Zip Code \_\_\_\_\_

Primary Contact's Signature \_\_\_\_\_

*\*By signing above, I/we agree that we will comply with all rules and regulations contained within the prospectus. Please note that NAEPC cannot accept or execute changes to the rules and regulations, addendums to the rules and regulations, or additional agreements related to participation.*

Additional / Marketing Contact (This person will be copied on all pre-conference details and communication, including the logistics kit that provides information on set-up, hall hours, shipping, attendee request, etc. If none, please leave blank.)

Marketing Contact's Name \_\_\_\_\_

Marketing Contact's Telephone \_\_\_\_\_ Marketing Contact's Email \_\_\_\_\_

Address \_\_\_\_\_ City, State, Zip Code \_\_\_\_\_

## Step #3, Payment

Payment required with commitment.

**Please retain a copy of this form as your receipt.**

Enclosed is our \$ \_\_\_\_\_ check payable to "NAEPC", or

Use the Secure Payment Submission Form: <http://www.naepc.org/products/product/3> (payments are not automatically processed), or

Bill Credit Card Number \_\_\_\_\_ Exp. Date \_\_\_\_\_

Amount \$ \_\_\_\_\_ Name as it appears on card \_\_\_\_\_

Zip Code Associated with Credit Card \_\_\_\_\_ Signature \_\_\_\_\_

*If your firm requires an onboarding process to initiate payment, please email details & instructions to [conference@naepc.org](mailto:conference@naepc.org).*

# Application: General Session, Workshop & Webinar

We are applying for a \_\_\_ general session, \_\_\_ webinar, \_\_\_ workshop (check all that apply).

*If your firm is applying for a general session and webinar, and the subjects will be different, submit two versions of this page.*

I have read the General Session/Webinar or Workshop FAQ page prior to completing this application. *Initial Here:*\_\_\_

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

Please complete this portion only if the contact person for this session is different than the individual(s) noted on the commitment form:

Name\_\_\_\_\_

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

Address\_\_\_\_\_

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

Please provide information about your session. This information will be published in the registration materials.

Session Title (not the topic) \_\_\_\_\_

Knowledge Level (choose one) \_\_\_\_\_Basic \_\_\_\_\_Intermediate \_\_\_\_\_Advanced

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

**REQUIRED ATTACHMENT WITH COMMITMENT FORM: Current biography for the speaker(s).**

One Paragraph Description

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**REQUIRED ATTACHMENTS WITH COMMITMENT FORM: Draft of the timed outline & PowerPoint slides for the program.**

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

1\_\_\_\_\_

2\_\_\_\_\_

3\_\_\_\_\_

Please explain how this session's content fits within the NAEPC Definition of Estate Planning:

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For sessions taking place at the conference, do you have a preferred day for your session? \_\_\_ No \_\_\_ Yes: \_\_\_\_\_

For webinars, please indicate the preferred month for your program:\_\_\_\_\_

*\*NAEPC will do its best to accommodate the noted preferences, but cannot guarantee the request.*

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, is not of a sales nature and not selling a product or service offered by my/our company, will not promote "DIY" estate planning services, and will be an accurate reflection of what has been outlined within this page and supporting materials. Furthermore, I understand and acknowledge that NAEPC cannot guarantee a specific day for the presentation or attendance at my/our session.

Signature\_\_\_\_\_ Date\_\_\_\_\_

# Mailing List Policy

All conference sponsors and exhibitors receive one pre-conference and one post-conference mailing list of contact details for use in promoting their attendance at the annual conference and/or the hosting of supplemental events. This list will include name, designations/discipline, firm name, and postal mailing address to the extent that they were provided by the attendee for those who have not opted out of receiving sponsor messages. Marquee, Premier & Partner Your Way sponsors that opted in will also receive email addresses within the attendee list.

The pre-conference list will be emailed to the primary and marketing contact four weeks prior to the program and the post-conference list will be sent two weeks after the conclusion of the program. By accepting delivery of these lists, a sponsoring or exhibiting company agrees to the terms outlined below.

- User may use attendee contact information for an approved use ONCE each time an attendee list is distributed. The pre-conference list may only be used pre-conference and the post-conference list must be used within thirty (30) days of the date on which it was sent to the sponsoring or exhibiting firm by NAEPC.
- All messages must contain a mechanism by which the recipient can opt-out.
- 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 "61st Annual NAEPC Advanced Estate Planning Strategies Conference".
- An approved use includes a postal mailing or an email message (email is only permitted when the sponsor's list includes email addresses).
- Use of the list to gather phone numbers is prohibited, as is telephoning those who appear on the lists.
- 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.
- 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 ten (10) days following receipt, any letters or documents (or copies thereof) of complaints received from attendees or a report of verbal 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.



**Any prohibited or unauthorized use by sponsoring or exhibiting company or failure to report attendee complaints shall constitute a material breach of the sponsorship agreement and may exclude company from participation in future NAEPC events.**

**Direct all questions related to this policy to [conference@naepc.org](mailto:conference@naepc.org) or 866-226-2224.**

# Rules & Regulations

These instructions and regulations have been formulated in the best interest of the sponsor / exhibitor and conference attendees. Please note that NAEPC cannot accept or execute changes to the rules and regulations, addendums to the rules and regulations, or additional agreements related to participation.

**Commitment, Payment & Cancellation** • Full payment is required with the commitment form and 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, frustration of purpose, commercial impracticability, 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 is determined by the NAEPC in its sole discretion. NAEPC reserves the right to adjust 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 audio-visual 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** • Any exhibitor that begins dismantling before the published tear-down time may revoke their right to exhibit at future NAEPC conferences.

**Distribution of Printed Matter** • Except from within rented space or as purchased as a part of this prospectus, exhibitors and sponsors shall not distribute printed matter, samples, souvenirs, and the like. Distribution of materials elsewhere in the exhibit hall, session space, in the hotel, or on hotel property is not permitted.

**Functions, Supplemental & Social Events** • All functions scheduled by a sponsor / exhibitor during conference dates must be submitted in writing and pre-approved by the NAEPC on or before September 29, 2024. 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.

**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 Workshops and Sponsored 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 & Supplemental Services** • Information regarding these items will be available to sponsors / exhibitors prior to the conference and will be distributed via email (the "Logistics Kit").

**Staffing and Behavior of Sponsor / Exhibitor Representatives** • All firm representatives must adhere to the NAEPC Event Conduct Statement: [www.naepc.org/content/conduct](http://www.naepc.org/content/conduct). 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.

**Subletting Space** • Subletting or sharing of space is not permitted.

## Sponsored General Session & Webinar FAQ

Sponsored sessions are provided as a way for organizations supporting the annual conference at the Marquee or Premier level to enrich the educational experience for attendees.

When are the sessions offered?

Up to three sessions will be offered during the conference (Monday, Tuesday, and/or Wednesday; schedule is created by NAEPC). The sessions will be offered first committed, first approved, first confirmed.

Topic & Session Guidelines

All sessions must focus primarily on one or more topics outlined within the [NAEPC Definition of Estate Planning](#), qualify for multi-disciplinary continuing education credit, and speakers must be of national prominence; sales and marketing presentations and/or topics are prohibited, as are any presentations that focus on "DIY" estate planning. **Interested sponsors must submit a complete application and all requested supporting documents with the commitment form and payment.** Applications will be reviewed by NAEPC and a determination will be communicated within 30 days of receipt or as early as practical. At no time shall a session provider deny attendance to their session to any conference attendee. NAEPC reserves the right to deny an application that is incomplete or does not meet the guidelines with regard to subject matter with no refund of sponsorship fees.

TOPIC GUIDELINES

What will NAEPC do to promote our session?

Those companies that have been approved to participate by April 15th will have information about their session included in the registration materials. The materials will clearly indicate that the program is a sponsored session.

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\*.

What will NAEPC not provide for our session?

NAEPC will not provide reimbursement for speaker travel or lodging expenses. 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.

Continuing Education Credit

The session is a part of the main conference and multi-disciplinary credit is requested for the program. As a result, the sponsoring company and all presenters must adhere to all requests and deadlines with regard to CE filing. This may include, but is not limited to, 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 April 15th will be promoted to the best of NAEPC's abilities online and in print.

Distribution of printed material during/at the session is prohibited.

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

Sponsored Workshops enrich the educational experience for attendees. Partner Your Way Enhanced Sponsors can opt-in to hosting a session as part of the benefit package while Partner Your Way Sponsors can opt-in to hosting a session for a fee.

When do the sessions take place?

These 30-minute sessions are scheduled from 7:15 am – 7:45 am on Monday and Tuesday morning (up to 2 concurrent sessions will be offered each morning).

Topic & Session Guidelines

All sessions must focus primarily on one or more topics outlined within the [NAEPC Definition of Estate Planning Sales](#) and marketing presentations and/or topics are prohibited, as are presentations that focus on “DIY” estate planning and contests, financial incentives, door prizes, etc. designed to increase attendance. **Interested sponsors must submit a complete application and all requested**

TOPIC GUIDELINES

**supporting documents with the commitment form and payment.** Applications will be reviewed by NAEPC and a determination will be communicated within 30 days of receipt or as early as practical. At no time shall a session provider deny attendance to their session to any conference attendee. NAEPC reserves the right to deny an application that is incomplete or does not meet the guidelines with regard to subject matter with no refund of sponsorship fees.

What will NAEPC do to promote our session?

Those companies that have applied and been approved to participate by April 15th will have information about their session included in the registration materials. Materials will indicate that the program is sponsored and will include notice of the sponsoring company.

What will NAEPC provide for our session?

- NAEPC will provide a podium, microphone, screen, and projector; speakers must bring a 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 the hotel’s AV contact to make arrangements.
- Complimentary conference registration for one (1) presenter\*.

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

NAEPC will not provide reimbursement for speaker travel or lodging expenses. 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 Workshop for credit, hosting companies may do so. 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, but will make a reasonable effort to promote the session as described above when a timely commitment form and application is received. Those commitments received after April 15th will be promoted to the best of NAEPC’s abilities online and in print. Room deliveries are available to promote a session for a nominal fee (see Attention Grabbers within the prospectus).

Sponsors are welcome to distribute printed material during/at the session.

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