

62nd Annual NAEPC
**ADVANCED
ESTATE PLANNING
STRATEGIES**
&
**COUNCIL
LEADERSHIP
CONFERENCES**

Gaylord National Resort
& Convention Center
Washington, DC

**SPONSORSHIP
PROSPECTUS**

**EXHIBITION
OCTOBER 19 - 21,
2025**

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2001 Crocker Rd., Ste. 510 | Westlake, OH 44145
866-226-2224

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

The Exhibition will take place beginning the evening of Sunday, October 19, 2025 through the afternoon of Tuesday, October 21, 2025 and will provide over ten hours of face-to-face time with attendees during meal, break, and reception periods.

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



SPONSORSHIP AT-A-GLANCE

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	LEADER'S CIRCLE \$30,000	TRUSTEE \$20,000	PARTNER \$12,000	DIRECTOR \$6,000	COLLABORATOR \$3,000
Discipline Exclusivity	Shared with Trustee	Shared with Leader's Circle			
Right of First Refusal for 2026 at Current Level of Support (by 12/31/25)	✓				
Exhibition Booth	✓	✓	✓	✓	✓
Conference "All Access" Registrations	5	4	3	2	1
Speaking Session	general session (up to three available, scheduled on Monday or Tuesday)	Monday or Tuesday Morning Workshop 7:15 - 7:45 am (up to four available)			
Host One-Hour Webinar for NAEPC Members During 2025	✓				
2-Minute Video on NAEPC Conference Website with One Share in NAEPCs LinkedIn Group	✓				
Expanded Exhibition Space	✓	✓	✓		
Preferred Exhibit Hall Placement	✓	✓	✓		
Hotel Key Card Sponsorship	✓				
Logo / Link on NAEPC News through 12/31/25	✓	✓	printed name		
Logo / Link on NAEPC Journal of Estate & Tax Planning through 12/31/25	✓	✓	✓		
Logo / Link on Conference Website	✓	✓	✓	✓	
Logo / Link on All Conference Email & Confirmation Messages	✓	✓	✓	✓	
Logo on Conference Signage	✓	✓	✓	✓	printed name
Logo on Council Leadership Conference Signage & Verbal Recognition during Learning Pods	✓	✓			
Placement in Materials Hub	to be determined	to be determined	to be determined	to be determined	to be determined
Included in Scavenger Hunt or Equivalent Activity & Opportunity to Contribute a Prize for the Drawing	✓	✓	✓		
Pre- and Post-Conference Attendee List with Email Addresses for Single Use	✓	✓	✓	✓	✓
President's Reception Recognition	presenting sponsor + five tickets	bar sponsor	dessert & coffee sponsor		
Reception Sponsorship	Sunday, Monday, and Wednesday	Sunday, Monday, and Wednesday	Wednesday (Council Awards)	Wednesday (Council Awards)	
2-Minute Speaker Introduction	✓	✓	✓		
Verbal Appreciation from Podium	✓	✓			
Inclusion in Post-Conference Email to Attendees Thanking Sponsors	logo / link	logo / link	logo / link	logo / link	printed name

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

BENEFITS

GENERAL

- Discipline Exclusivity (multiple sponsors accepted from different professional disciplines), shared with Trustee Sponsors
- Logo / Link on [NAEPC Journal of Estate & Tax Planning](#) and within [NAEPC News](#) through 2025
- Logo / Link on Conference Website & All Conference Messaging
- 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
- Logo / Link in Sponsor Thank You Email to All Attendees

SPEAKING & RECOGNITION

- 60-Minute General Session Presentation (up to three available, sessions are awarded first committed and approved, first placed when commitment is received by April 1st)
- Two-Minute Speaker Introduction for a General Session Presenter
- Verbal Appreciation from Podium during Annual Conference
- Verbal Appreciation by Facilitators during Learning Pods at Council Leadership Conference
- Present Educational Webinar for NAEPC Members during 2025 (limited to three)

ATTENDANCE

- Five Conference "All Access" Registrations, Including Most Meals

EXHIBITION

- Expanded Space & Premium Placement

LOGO PLACEMENT

- Hotel Keycard (logo or firm-provided image)
- Logo in Materials Library / Hub
- Logo on Annual Conference & Council Leadership Conference Signage
- Included in Scavenger Hunt or Equivalent Activity (incentivizes attendees to visit your booth) and Opportunity to Contribute a Prize for the Drawing

RELATED SPONSORSHIPS

- Signage at All Evening Receptions Acknowledging Firm as Sponsor
- Presenting Sponsor of Tuesday Evening President's Reception, plus Five Tickets for Firm Representatives and/or Guests

INVESTMENT | \$30,000

Leader's Circle Sponsors Receive Right of First Refusal for 2026 Leader's Circle Sponsorship with Commitment by December 31, 2025 and an Early Bird Discount for 2026 Participation.

BENEFITS

GENERAL

- Discipline Exclusivity (multiple sponsors accepted from different professional disciplines), shared with Leader's Circle Sponsors
- Logo / Link on [NAEPC Journal of Estate & Tax Planning](#) and within [NAEPC News](#) through 2025
- Logo / Link on Conference Website & All Conference Messaging
- Pre- and Post-Conference Attendee List Including Email Addresses
- Logo / Link in Sponsor Thank You Email to All Attendees

LOGO PLACEMENT

- Logo in Materials Library / Hub
- Logo on Annual Conference & Council Leadership Conference Signage
- Included in Scavenger Hunt or Equivalent Activity (incentivizes attendees to visit your booth) and Opportunity to Contribute a Prize for the Drawing

EXHIBITION

- Expanded Space & Premium Placement

ATTENDANCE

- Four Conference "All Access" Registrations, Including Most Meals

RELATED SPONSORSHIPS

- Signage at All Evening Receptions Acknowledging Firm as Sponsor
- Bar Sponsor of Tuesday Evening President's Reception

SPEAKING & RECOGNITION

- 30-Minute Workshop Presentation (up to two available on Monday and Tuesday at 7:15 am, sessions are awarded first committed and approved, first placed when commitment is received by April 1st)
- Two-Minute Speaker Introduction for a General Session Presenter
- Verbal Appreciation from Podium during Annual Conference
- Verbal Appreciation by Facilitators during Learning Pods at Council Leadership Conference

INVESTMENT | \$20,000

Trustee Sponsors are Eligible for an Early Bird Discount for 2026 Participation.



BENEFITS

GENERAL

- Logo / Link on [NAEPC Journal of Estate & Tax Planning](#)
- Printed Company Name with Link within [NAEPC News](#) through 2025
- Logo / Link on Conference Website & All Conference Messaging
- Pre- and Post-Conference Attendee List Including Email Addresses
- Logo / Link in Sponsor Thank You Email to All Attendees

ATTENTION GRABBER

Host a 30-Minute Workshop (up to two available on Monday and Tuesday at 7:15 am, sessions are awarded first committed and approved, first placed when commitment is received by April 1st)

\$3,900 Fee Applies

EXHIBITION

- Expanded Space & Premium Placement

ATTENDANCE

- Three Conference "All Access" Registrations, Including Most Meals

LOGO PLACEMENT

- Logo in Materials Library / Hub
- Logo on Annual Conference Signage
- Included in Scavenger Hunt or Equivalent Activity (incentivizes attendees to visit your booth) and Opportunity to Contribute a Prize for the Drawing

RELATED SPONSORSHIPS

- Signage at Council Awards Reception Acknowledging Firm as Sponsor
- Dessert & Coffee Sponsor of Tuesday Evening President's Reception

SPEAKING & RECOGNITION

- Two-Minute Speaker Introduction for a General Session Presenter

INVESTMENT | \$12,000

Partner Sponsors are Eligible for an Early Bird Discount for 2026 Participation.



BENEFITS

GENERAL

- Logo / Link on Conference Website & All Conference Messaging
- Pre- and Post-Conference Attendee List Including Email Addresses
- Logo / Link in Sponsor Thank You Email to All Attendees
- Standard Exhibition Space

LOGO PLACEMENT

- Logo in Materials Library / Hub
- Logo on Annual Conference Signage

RELATED SPONSORSHIPS

- Signage at Council Awards Reception Acknowledging Firm as Sponsor

ATTENDANCE

- Two Conference "All Access" Registrations, Including Most Meals

INVESTMENT | \$6,000

BENEFITS

ATTENDANCE

- One Conference "All Access" Registration, Including Most Meals

GENERAL

- Pre- and Post-Conference Attendee List Including Email Addresses
- Printed Name in Sponsor Thank You Email to All Attendees
- Standard Exhibition Space

LOGO PLACEMENT

- Logo in Materials Library / Hub
- Printed Name on Annual Conference Signage

INVESTMENT | \$3,000

ATTENTION GRABBER

Host a 30-Minute Workshop (up to two available on Monday and Tuesday at 7:15 am, sessions are awarded first committed and approved, first placed when commitment is received by April 1st)

\$3,900 Fee Applies

ATTENTION GRABBERS

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30-Minute Educational Workshop \$3,900 Four Available	Host a 30-Minute Educational Workshop Up to two available on Monday and Tuesday at 7:15 am, sessions are awarded first committed and approved, first placed when commitment is received by April 15th. Preference will be given to Trustee Sponsors. More information about session content and requirements can be found on page 16.
Up Close & Personal with Council Leaders \$1,750 / Registrant	The Exhibition and Exhibit Hall may have closed, but this offering let's you continue to be visible to the council leaders by providing 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.
Lanyard \$4,000 One Available	SOLD OUT We'll personalize the lanyards that our attendees wear through the <i>entire conference</i> with your firm's logo.
NEW Hydration Hub 5,000 One Available	Help keep conference attendees refreshed throughout the day. Your firm logo will be prominently displayed on the "Hydration Hub," a station near the general session space that includes hydration drinks. The station will be available on Monday and Tuesday from approximately 9:30 am - 3:30 pm.
NEW Snack Stop \$5,000 One Available	Snack attack? Your firm logo will be prominently displayed on the "Snack Stop," a station near the general session space that will include snack foods and treats. The station will be available on Monday and Tuesday from approximately 9:30 am - 3:30 pm.
NEW Caffeine Connection \$5,000 Two Available	Everyone needs a "pick me up" during a long day of sessions. This attention grabber will allow us to provide a specialty coffee station on Monday and Tuesday near the general session space from approximately 9:00 am to lunch. Attendees can stop by, grab a specialty coffee, and head back into their session ready to learn.
NEW Power Islands \$1,750 One Available	We will be providing three freestanding charging stations throughout the conference that are branded with your firm's logo or graphics.
Notepads \$750 One Available	You supply the notepads and we will make sure that they are at each place setting in the general session room on Monday, Tuesday, and Wednesday.
Under Door Delivery \$1,500	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. Multiple sponsors from different disciplines accepted Sunday and Monday
Water Bottles \$750 One Available	SOLD OUT Your firm-provided water bottle will be available at the the green water stations in the general session room and exhibit hall for the duration of the conference with a sign at each cooler that displays your firm logo.
Corporate Supporter / Literature Table \$1,500	Unable to sponsor or exhibit, but still want to support NAEPC and its members? This offering provides signage recognition and allows one piece of your company provided literature to be displayed on a shared table within the exhibit hall. Conference registrations are <i>not</i> included in this opportunity. Your firm name will be included in the post-conference sponsor thank you message.

WITH THE EXCEPTION OF THE WORKSHOP AND UNDER DOOR DELIVERIES, ATTENTION GRABBERS ARE AVAILABLE TO REGISTERED SPONSORS OR FIRMS THAT WILL NOT HAVE AN ON-SITE PRESENCE.

The Robert G. Alexander Webinar Series was launched in September 2013 to provide multi-disciplinary estate planners with accessible, high quality supplemental education. Programs typically take place on the second Wednesday of each month at 3:00 pm ET.

BENEFITS

LOGO

- Logo /  on www.naepc.org
- Promotional Email Messages



2026 COMING SOON

- Up to Two Minutes at the Beginning of the Webinar to Share Information about Your Firm
- Verbal Acknowledgment of Sponsorship by Moderator

INVESTMENT | \$1,000

NAEPC reserves the right to change the sponsor's month of support to another month if a conflict exists between the sponsoring firm and presenter.

2025 SPEAKERS & TOPICS

Find the Most Current Information and Schedule at <https://www.naepc.org/events/webinar>

1/22/2025

Jerome M. Hesch & Brandon L. Kentron

Using Financial Modeling to Explain the Tax Benefits of an Estate Planning Technique in an Understandable Manner

2/12/2025

Jennifer B. Goode

Into the Great Wide Open: Flexible Planning for Descendant-Free Individuals

3/12/2025

Kyle C. Martin

Adequate Disclosure on Gift Tax Returns Form 709

4/23/2025

Martin M. Shenkman, CPA/PFS, MBA, JD, AEP® (Distinguished)
Estate Planning Tips and Developments

5/14/2025

Ash Ahluwalia

Don't Let Clients Leave Social Security on the Table

6/11/2025

Ashley L. Case

Look What You Made Me Do: A Checklist for Post-Mortem Tax Planning (Taylor's Version)

7/9/2025

Jim Coutré

Planning Beyond the Financial Capital

8/13/2025

To Be Determined

9/10/2025

To Be Determined

11/12/2025

To Be Determined

12/10/2025

John A. Warnick
Topic TBD

AVAILABLE

Step #1, Choose your Level of Support

	Leader's Circle	Trustee	Partner	Director	Collaborator	Attention Grabber	Webinar
Cost of Entry	\$30,000	\$20,000	\$12,000	\$6,000	\$3,000	\$ _____	\$1,000
Select Your Level of Support:	☐	☐	☐	☐	☐	your choice:	preferred month:

In order to meet deadlines and to ensure sufficient time for approval, the application and materials related to an educational session are required within 30 days of the submission of this form if submitting before April 1, 2025. Commitments sent on or after April 1, 2025 must be accompanied by the application and all related materials.

Step #2, Provide 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 / as the link (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, including the mail list policy. 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 setup, 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 _____

① FOR YOUR SAFETY, WE DO NOT RECOMMEND EMAILING CREDIT CARD INFORMATION

Step #3, Offer Full Payment

✓ FULL PAYMENT REQUIRED WITH COMMITMENT
✓ RETAIN A COPY OF THIS FORM AS YOUR RECEIPT

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

☐ I have used the Secure Credit Card Submission Form: <http://www.naepc.org/products/product/Z> (payments are not automatically processed), or

Credit Card Number _____ Exp. Date _____

Amount \$ _____ Name as it appears on card _____

Zip Code Associated with Credit Card's Billing Address _____ Signature _____

If your firm requires an onboarding process to initiate payment, please email details & instructions to conference@naepc.org.

Direct inquiries to sponsorship@naepc.org

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- All booth assignments are handled internally; a floorplan is not released pre-conference.
- Traditional exhibit displays are limited to table-top size ([example](#)) with the exception of the levels of support that receive expanded space. Retractable signage ([example](#)) is permitted when placed in a location that does not interfere with the flow of traffic and/or sight lines, like behind your booth or on the table.
- 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. Expanded space provides two six-foot tables.

INBOUND AND OUTBOUND SHIPPING OF BOOTH MATERIALS

Materials will be shipped directly to the hotel using the sponsors preferred carrier; NAEPC does not utilize an exhibition/drayage company. Instructions will be provided in the final sponsor logistics kit, which is distributed late summer.

SET-UP, TEAR-DOWN, AND EXHIBITION HOURS

NAEPC provides over ten 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 19, 2025	MONDAY OCTOBER 20, 2025	TUESDAY OCTOBER 21, 2025
Set-Up 12:00 pm – 4:00 pm	Breakfast 7:00 am – 8:00 am	Breakfast 7:00 am – 8:00 am
VIP Reception with Exhibitors, NAEPC Board, Past Presidents & Estate Planning Council Leaders 4:30 pm – 5:00 pm	Break 10:00 am – 10:40 am	Break 9:55 am – 10:35 am
All-Attendee Reception 5:00 pm – 6:30 pm	Lunch 11:40 am – 1:10 pm	Lunch 12:35 pm – 1:35 pm
	Break 3:25 pm – 4:00 pm	Break 3:35 pm – 4:05 pm
	All-Attendee Reception 5:00 pm – 6:30 pm	Tear-Down 4:05 pm

**Take advantage of the open evenings by hosting social events for attendees,
especially on Tuesday after tear-down!**

See page 15 for more information.

Commitment, Payment & Cancellation • Full payment is required with the commitment form and is 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 & Council Leadership 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 in connection therewith.

Addendums • NAEPC cannot accept or execute changes to the rules and regulations, addendums to the rules and regulations, or additional agreements related to participation.

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, 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 participant that begins dismantling before the published tear-down time may revoke their right to participate in future NAEPC conferences.

Distribution of Printed Matter • Except from within rented space or as purchased as a part of this prospectus, 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.

Insurance & Liability • Sponsor 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 sponsor'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, excluding any such liability caused by the sole negligence of NAEPC and its employees, contractors, and board of directors.

Logos and Publicity • NAEPC will use the logo(s), firm name, design(s), trademarks, etc. provided by Sponsor for the sole purpose of fulfilling benefits associated with the sponsor's chosen level of support and may do so without obtaining prior consent. NAEPC and National Association of Estate Planners & Councils names or logos may not be used by Sponsor for any purpose. The sponsoring or exhibiting company may reference their attendance at the "62nd Annual NAEPC Advanced Estate Planning Strategies Conference".

Mail List Policy and Usage • All conference sponsors receive one pre-conference and one post-conference mailing list of contact details for use in promoting their attendance at the annual conference. This list will include name, designations/discipline, firm name, postal mailing address, and email address to the extent that they were provided by the attendee, for those who have not opted out of receiving sponsor messages.

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 completing the commitment form and accepting delivery of these lists, a sponsoring company agrees to the terms outlined within this section.

Mail List Policy and Usage, Continued •

- 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.
- Use of the list to gather phone numbers is prohibited, as is telephoning those who appear within.
- 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 should reference their attendance at the "62nd Annual NAEPC Advanced Estate Planning Strategies Conference".
- An approved use includes a postal mailing or an email message.
- 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 of the mailing list by a sponsoring company or failure to report attendee complaints constitutes a material breach of the sponsorship agreement and may exclude company from participation in future NAEPC events and/or cancellation of sponsorship / exhibition space without refund. Direct all questions related to this policy to conference@naepc.org or 866-226-2224.

Programming • Sponsors may not conduct promotional or educational programming including lectures, demonstrations or audiovisual presentations during conference programming hours except for approved Workshops and Sponsored General Sessions.

Property Damage • Sponsors 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 prior to the conference and will be distributed via email (the "Logistics Kit").

Staffing and Behavior of Representatives • All representatives must be registered with NAEPC. In the event an attendee is not registered and attends any portion of the event, NAEPC will invoice the firm for the additional exhibitor fee and such invoice must be paid within 14 days of receipt. Unregistered attendees will not be permitted in the exhibition area.

All firm representatives must adhere to the NAEPC Event Conduct Statement: www.naepc.org/content/conduct. In addition, any 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 fee, attendee fee, transportation and lodging costs, meals, shipping costs, etc.

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

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

Enforceability • If any portion(s) of this document is (are) determined to be invalid or unenforceable, the remaining portion(s) shall nevertheless remain valid and enforceable.

Social events enhance the conference experience for attendees and provide sponsoring 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 firms during the Annual Advanced Estate Planning Strategies Conference. A group dinner at a nearby restaurant, special outings, dancing lessons, a 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.

While we no longer have a formal approval process, firms planning to host an event at which 15 or more will be in attendance must submit all of the following information to conference@naepc.org on or before September 26, 2025:

- event date
- start and end time
- location
- intended invitees.

If you are considering hosting an event on-property at the hotel, please allow additional planning time as the hotel requires NAEPC to sign off on the event.

An additional attendee list will be provided seven days before the program to those firms that have submitted plans by the deadline. **This list may be used only once for the sole purpose on inviting attendees; all Mailing List Policy guidelines apply.**

Multiple sponsored events may take place at the same time.

Any sponsor / exhibitor deemed to have scheduled an event that takes place during the official conference hours may revoke their right to participate in future NAEPC conferences. Pre-paid sponsor fees will not be refunded.



WHEN ARE THE SESSIONS OFFERED?

- **General Sessions:** Up to three sessions will be offered during the conference on Monday and Tuesday, the schedule is determined by NAEPC at its sole discretion. Sessions are offered first committed, first approved, first confirmed.
- **Workshops:** 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).
- **Webinars:** On a mutually-agreeable date and time during the calendar year of the conference.

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 expressly prohibited, as are any presentations that focus on “DIY” estate planning. General session presentations must also qualify for continuing education credit. **Interested sponsors must submit a complete application and all requested supporting documents as outlined on the commitment form and will not be considered until full payment has been received. For those sponsors presenting yearly, the session title, topic, and content cannot be a duplicate from the prior year.** Applications will be reviewed by NAEPC and a determination will be communicated within 30 days of receipt or as early as is 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 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 GENERAL OR WORKSHOP 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, furniture, lighting, staging, or set-up be requested, that expense is the sole responsibility of the sponsor.

CONTINUING EDUCATION CREDIT (GENERAL SESSIONS ONLY)

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. Workshops are not filed for continuing education credit.

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 a general session is prohibited. Materials may be distributed during workshops.

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

SPONSORED SESSION APPLICATION

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We are applying for a ☐ general session, ☐ workshop, ☐ webinar (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 entire Sponsored Session FAQ page prior to completing this application and fully understand the topic/session guidelines outlined within. 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:

Session Contact Name _____

Telephone # _____ Email _____

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 WITHIN 30 DAYS OF COMMITMENT FORM WHEN SUBMITTED BEFORE APRIL 1st AND WITH COMMITMENT FORM WHEN SUBMITTED ON APRIL 1st OR LATER: Current biography for the speaker(s).

One Paragraph Description

REQUIRED WITHIN 30 DAYS OF COMMITMENT FORM WHEN SUBMITTED BEFORE APRIL 1st AND WITH COMMITMENT FORM WHEN SUBMITTED ON APRIL 1st OR LATER: 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:

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 prospectus 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 _____