

MAILING LIST POLICY

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.

- 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.