

Exhibit and sponsor
prospectus



25th Annual
AICPA Employee
Benefit Plans Conference

May 15–17, 2018 | Wynn, Las Vegas, NV

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About the conference

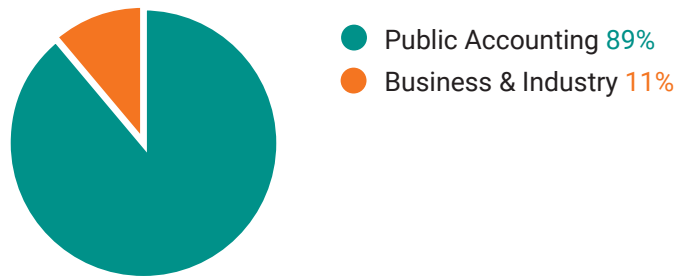
Join AICPA for the 25th Anniversary of the Employee Benefit Plans Conference. Explore special exhibitor and sponsorship opportunities and secure your part of this special occasion today!

The **AICPA Employee Benefit Plans Conference** is an unprecedented event that brings together more than 1,000 participants for a rare opportunity to network with some of the industry's highest-level professionals. This conference brings auditors, tax professionals and plan sponsors together to discuss and debate issues of the day. This is one of the few events where attendees will hear directly from the Department of Labor and IRS on changes impacting both the tax and auditing sides of employee benefit plans. Reach attendees of this well-attended event through one of the many networking opportunities throughout the conference.

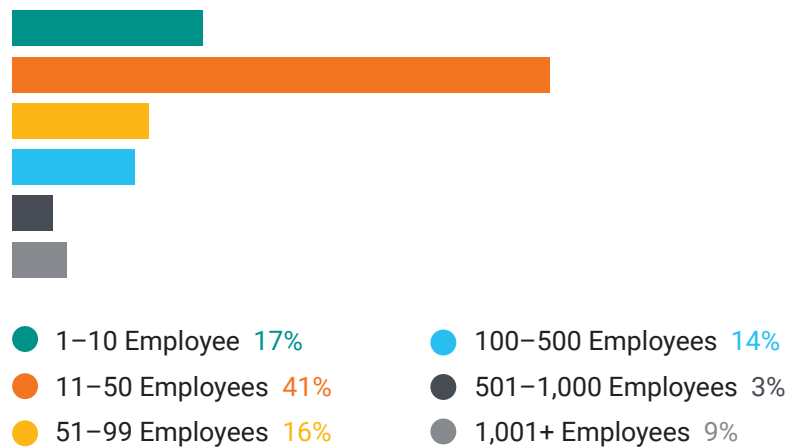
Demographics

Targeted attendees include CPAs, auditors, tax practitioners, plan sponsors and accountants, and consultants involved in the administration, tax and financial areas of employee benefit plans.

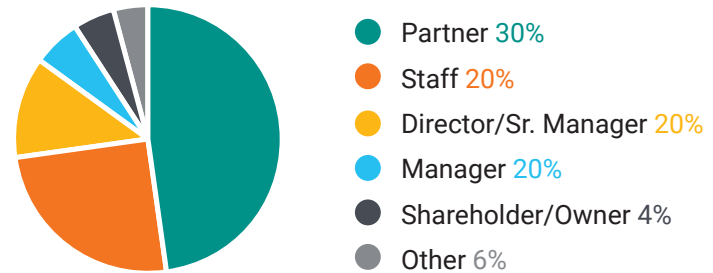
1,160 attendees:



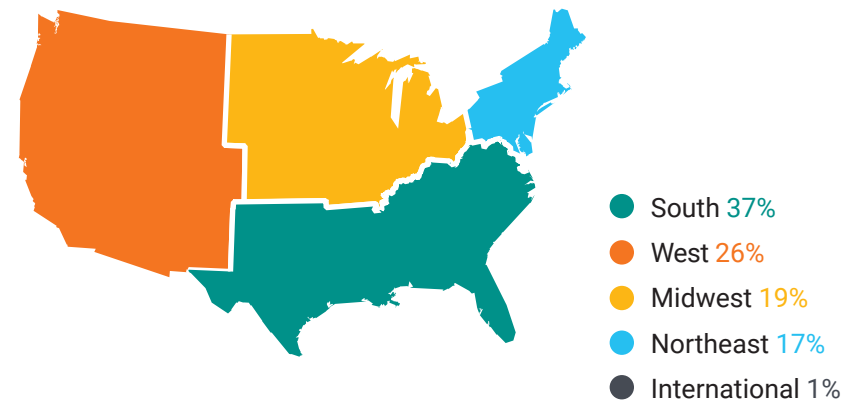
Firm size



Top titles



Attendees by region



Reach and sell CPA professionals, plan sponsors and consultants involved in the administration, tax and financial areas of employee benefit plans with well-equipped booth space starting at only \$3,900 or secure a sponsor booth with a sponsorship which includes your booth cost!

Only AICPA delivers a national audience of top-level CPA and EBP professionals! At this and all AICPA Conferences, you benefit from a quality audience and exciting exhibit hall programs that create maximum selling time.

When you exhibit, you get 10 x 10 ft booth that comes with a carpeted floor, draped table with two chairs and wastebasket. You also earn these sales-building benefits:

- 2 main-conference passes for you and your staff that qualify for CPE credit when desired. (For additional conference passes, contact AICPA Group Sales.)
- Unlimited expo-only passes at \$500 each (no admission to sessions).
- Pre- and post-conference attendee lists with USPS mailing addresses.
- Inclusion in the mobile app exhibitor directory with 50-word company description.
- Special attendee discount code for your customers and prospects.

And don't forget the advantages of sponsorship. SPONSORSHIPS position your company as a leader at a time when key decision-makers are eager to learn, and ready to help their firm or clients grow. So when you think about investing in face-to-face interaction at an AICPA Conference, consider the impact that a sponsorship will make on key customers and prospects.

Becoming a sponsor is easy. We offer sponsorships at many price-points, and all come with premium exhibit space and all exhibitor benefits! With any sponsorship you choose, you receive brand-building exposure with your corporate logo on signage, on big screens in general sessions, in the conference mobile app and more.

“The attendees are very approachable and are interested in learning about what we do. It is a great opportunity to interact with attendees to find out what is on their minds. It is a great match!”

Norma McCutcheon, COO, ERISApedia.com

Consultants and Leaders in:

- Payroll/Payment Systems
- Automation/Paperless
- Cloud Computing/Cloud Solutions
- Large Trustees
- Financial Services/Business Advisory
- Electronic Audit Software Providers
- ERISA attorneys
- Tax Automation
- TPAs
- Workflow
- Pricing Companies
- Qualified Plan Consultants
- Custodians/Service Providers
- Accounting and Auditing
- Valuation Companies
- Insurance Providers
- Tax Incentives/Cost Segregation
- Tax Prep Software
- Plan Administrative Firms
- Document Management
- Data Security
- Risk Strategies & Management
- Information Management
- Online Communication
- Plan Advisors
- Recordkeepers
- Software Providers of Form 5500
- Technology/IT Services
- Practice Management Software

Why exhibit?

- This is your Prime Target Market
- Showcase Products & Services
- Stand Out as a Leader
- Build Brand Awareness
- Network with New Clients
- Strengthen Relationships with Existing Customers
- Check Out Your Competition
- Reach True Decision-Makers
- Reach & Exceed Sales Goals
- Increase Market Share

**People like to do business
with people they've met face to face.**

Executive level:

Gold level (\$20,000) 25th Annual Conference Co-Sponsorship Opportunity (3 available)

Each exhibitor will receive: Recognition as a sponsor for the 25th Annual Conference Celebration Reception on Day 1 of the Conference, full page ad in the conference program, 3 additional registrations, banner ad on conference mobile app, and insert in the Tote Bag or Conference Folder with one of the following add-ons on a first-come basis based on availability

1. **Lanyards** – Company name or logo will be prominently imprinted on the name badge Lanyards which are worn by attendees, speakers, committee members, exhibitors and staff through the conference.
2. **Custom Cocktail at the 25th Anniversary reception** – This is your chance to be the mixologist for our event. Work with the hotel chef to create a custom cocktail that will be available for one night only!
3. **Entertainment Sponsor** – Every great party needs great entertainment and what better way to celebrate the 25th Annual Conference than with great music. Be our exclusive entertainment sponsor and be prepared to introduce our entertainment for the evening. Everyone will be sure to thank you!

Silver level (\$12,000 – \$15,000)

WiFi/Power Zone – \$15,000

Major signage, tent cards, logo and sponsorship recognition on back of attendee badges (info section of the badge) and customized password (in some venues).

Full Conference Coffee Break – \$15,000

All-Day Coffee service in Expo Hall, your exhibit booth will be placed adjacent to coffee station driving traffic to your booth; your logo on our prominent signage throughout the conference and printed coffee sleeves used at coffee stations; title recognition as a Sponsor on conference materials.

Luncheon – \$13,500

Prominent signage at luncheon as well as company name and/or logo on customized menu, up to two tables reserved to invite customers/prospects.

Tote bag – \$13,000

Work with our marketing team to design a tote bag with your logo to be given to all attendees and speakers as well as a complimentary insert.

Wine and Cheese Reception – \$12,000

We will host a pre-conference reception before the conference kicks off and this is a great opportunity to take the lead early as the exclusive sponsor. Major signage and logo on cocktail napkins included.

Also included:

- 2 additional registrations
- Full page ad in the conference program
- Banner ad in the Conference App

Sponsorships increase your ROI, drive traffic to your booth and build brand recognition in a competitive marketplace.

The following sponsorships were designed to stretch your marketing budget and help your business STAND OUT as an industry leader.

Executive level:

Bronze level (\$7,000 – \$10,000)

Mobile APP – \$9,000

Your logo on large-scale version of the mobile app located near your booth, rotating banner ad on app, logo on splash screen, recognition in the mobile app invitations and promotions.

Refreshment Break (2 Available) – \$8,500

Located in the Expo Hall, Afternoon Breaks provide high traffic and exposure. Title recognition with prominent signage and your company logo imprinted on napkins used during break.

Specialty Bar – \$8,500

Learning Lab – \$7,500

Sponsor a 20-25 minute mini-solution session during a networking break in the Expo Hall Learning Pavilion. Major signage and session promoted in the conference program.

Notebook and Pen – \$8,500

Sponsor supplied notebook and pen set with logo distributed to all attendees.

Also included:

- One additional exhibitor registration

All sponsorships receive the following:

- A 10' x 10' exhibit space in a Premium Location (top of aisle, on a corner, near the entrance, near F&B stations, near bar).
- At least two (2) conference badges with CPE credit. (more badges offered depending on the Sponsorship.)

Branding advantages with all sponsorships:

- Premium listing in the Mobile App Exhibitor Directory.
- Your company logo on the "Thank You" signage at the entrance to Exhibit Hall.
- Your company name/logo will be prominently displayed on signage promoting your Sponsorship.
- Company logo on PowerPoint slide recognizing you as Sponsor. Slide rotates with other sponsor slides during session breaks.
- Company listing with link to company website on Conference website.
- Your company logo on the Conference Mobile App.
- Inclusion in conference marketing materials, e-blasts and social media, wherever possible.

Speaking Opportunities:

Ask about our solution session* opportunities on the Sponsor Track available to Silver and Gold level sponsors.

* To maintain program integrity, consistency and assure attendee interest, all presentations are required to be educational in nature and approved by the Committee.

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Preconference logistics information:

The person listed below will receive all exhibit-related correspondence, including the Exhibitor Kit/Service Manual.

Name: _____
Title: _____
Company name: _____ Publicity name: _____
Address (no P.O. Boxes): _____
City: _____ State: _____ ZIP: _____
Country: _____
Phone: _____
Email: _____

Conference advertising (exhibitors and sponsors only):

Tote Bag Insert: \$2,000 | On-site Conference Program: Inside Full Page: \$1,000 | Conference Mobile App: Mobile App Banner Ad: \$1,000

Space assignment/pricing: Locations will be assigned based on availability at the time the contract is received. Cost is \$3,900 for a 10' wide by 10' long booth space which includes carpet, draped table, and two chairs.

Booth preference: _____ 1st choice _____ 2nd choice _____ 3rd choice

Companies you do NOT want to be near (if possible): _____

Companies you want to be near (if possible): _____

Conference sponsor: Indicate the type of sponsorship and price below. If you are interested in additional sponsorship opportunities, please contact Morris Marketing at 800.504.4749.

Sponsorship: _____ Price: _____

Payment and cancellation policy: Space locations will be confirmed once application and full payment is received. Full payment must be received 30 days of the invoice date. **Applications received within 60 days of the conference will be invoiced immediately and must be paid immediately.** Cancellations received 60 days or more prior to the conference will entitle the exhibitor to a refund minus 10 percent (10%) of the exhibit fee. No refunds will be given on cancellations received fewer than 60 days before the conference. All cancellation requests must be made in writing to Morris Marketing via fax 888.316.9536 or email amorris@morrismarketinginc.com.

Exhibitor acceptance: By signing this contract, I affirm that I am a duly authorized agent of my organization, that I have the authority to complete and submit this application, and that my organization agrees to all the terms and conditions contained in the exhibitor prospectus, space application and contract. By signing this contract, I acknowledge that I am responsible for full booth payment.

Print Name: _____ Title: _____

Signature: _____ Date: _____

Return exhibit application to: jerickson@morrismarketinginc.com or Fax 888.316.9536

If paying by check, make payable & send to: AICPA Conferences, Employee Benefit Plans Conference, P.O. Box 37048, Boone, IA 50037-0048

If paying by credit card, complete attached payment form & securely send to: jerickson@morrismarketinginc.com

FOR AICPA USE ONLY: Date Recd: _____ Date Entered: _____ Booth # Assigned: _____ Total Price: \$ _____ Amt Recd: \$ _____ Balance Due: \$ _____ BATES No. _____

2018 Exhibitor rules and regulations

Purpose of the exhibit: The exhibition is for the purpose of education and to provide a service to the AICPA membership.

Standard exhibit space: The exhibition space will be provided in the form of a tabletop space. Each exhibitor will be provided with:

- One draped table;
- Two chairs; and
- One wastebasket.

Upon acceptance of applications for exhibit space, exhibitors will be sent an exhibitor package outlining:

- Shipping procedures;
- Set up and dismantle instructions; and
- Information on securing electricity, audiovisual equipment and other supplies.

Prices: The exhibit price includes all items described below (under "Exhibit fee includes"). All payments must be received by the AICPA within 30 days of the invoice date. All exhibits and sponsorships must be paid in full prior to the start of the conference. Exhibitors will not be allowed access to the exhibition hall unless all fees have been paid in full.

Exhibit fee includes*:

- Rental of the standard exhibit space (as described previously);
- Admission to the main conference sessions for two (2) representatives from the exhibiting company. (For additional conference passes, contact AICPA Group Sales, 919.402.4823.) Additional unlimited expo-only passes may be purchased at \$500 each (no admission to sessions);
- Breakfasts, breaks, luncheons and the welcome reception for two (2) representatives from the exhibiting company;
- Registration list, including the names and postal addresses of conference participants (no e-mail addresses), before and after the conference for one-time use;
- Listing in the conference mobile app;
- Special discount for your customers and prospects to attend the conference.

The AICPA does not endorse products offered by any vendor unless otherwise stated.

* Exhibit fees do not include hotel accommodations.

Exhibit hours: Exhibit hours are established by the AICPA. Unless otherwise noted, exhibits may not be open while the conference sessions are in progress. Exhibit hours are scheduled; however, these times are approximate and subject to change pending the final conference agenda. To maintain the educational integrity of the program, exhibitors are asked to adhere to the exhibit hours indicated. This will enable conference participants to receive the maximum benefit from the conference program and the exhibits.

Exhibit setup and dismantle: Exhibitors are responsible for setting up and dismantling their exhibits during established time periods. **NOTE: Early dismantling is not permitted. Firms that dismantle prior to the end of the exhibit time will not be given priority when choosing booth locations at next year's conference or may be denied exhibit privileges at future AICPA programs.**

Assignment of exhibit space: In assigning exhibit space, full consideration will be given to competing products and general grouping of exhibits for proper display and comparison. Every effort will be made for the equitable assignment of space. The AICPA reserves the right to relocate any exhibit for the benefit of the exhibitor or for the betterment of the exhibition. No firm, organization, individual or company without assigned exhibit space will be permitted to display or distribute products or literature, or solicit business within the exhibit hall.

Exhibitors will not be permitted to assign, sublet or share with others any part of the space allocated to them without written approval from the AICPA.

Eligible exhibits: The AICPA reserves the right to determine the eligibility of any company or product for inclusion in the exhibition and to reject, eject or prohibit any exhibit, in whole or in part, or exhibitor with or without giving cause. If cause is not given, liability shall not exceed the return to the exhibitor of the amount of the exhibit fee unearned at the time of the ejection. If an exhibit or exhibitor is ejected for violation of these Rules and Regulations or any other stated reason, no return of fee shall be made.

Use of space: Vendors may use exhibit booths or backdrops, provided they can be accommodated within their individual exhibit space and do not violate fire safety laws. Exhibits must be constructed so as not to obstruct the general view or the view of neighboring exhibits. Interference with the lighting and space of other exhibitors is prohibited. The AICPA reserves the right to restrict exhibits that, because of method of operation, materials, or for any reason, become objectionable. All sound equipment must be regulated so that it does not disturb neighboring exhibitors or the conference sessions.

The AICPA reserves the right to determine at what point sound constitutes interference with others and must be discontinued. Due to licensing and copyright regulations by ASCAP/BMI regarding music at public meetings, conventions and shows, exhibitors may not play music during the exhibition, either live or recorded.

Character of Display: Any materials not in keeping with the character and standards of the AICPA may not be distributed or utilized by any exhibitor. The AICPA reserves the right to prohibit or evict any exhibit that, in the opinion of the AICPA, detracts from the general character of the exhibition as a whole. This reservation includes persons, things, conduct, printed matter or anything of a character that the AICPA finds objectionable. In the event of such restriction or eviction, the AICPA and its employees and agents shall not be liable for any refunds of rentals or other exhibit expenses.

Professional conduct: Exhibitors should adhere to professional standards of behavior. All solicitation, demonstration and other promotional activities must be confined to the limits of the exhibit space.

Staffing: Exhibits should be staffed during the specified exhibit hours by knowledgeable representatives. Exhibitors must supply the AICPA with the name(s) of all representatives who will attend the exhibition. The AICPA will not provide staffing for the exhibits.

Badges: Exhibitor representatives must wear appropriate AICPA badges at all times in the exhibition hall. The badges will be available at the conference registration desk during the exhibit set-up period.

Security: Although the AICPA and the hotel may maintain a security force, exhibitors are responsible for the safety and security of their exhibits and should consider removing from the exhibition hall or otherwise securing all equipment, supplies and other materials at the close of each conference day.

Shipping/drayage/storage: Exhibitors are responsible for shipping materials to and from the conference. Any and all costs associated with the shipping, drayage and storage of exhibit materials are the responsibility of the exhibitor.

Fire, safety and health: Federal, state and local laws covering fire, safety and health must be strictly observed. Aisles and fire exits must not be blocked by exhibits. Storage of boxes and materials beneath exhibit tables may also be restricted. All materials used in decoration must be flame-proof. Electrical wiring must conform to the National Electrical Code Safety Rules. Please follow the instructions of the hotel personnel and/or the contracted exhibition company regarding conformity with fire, safety and health codes.

Care of facilities: Exhibitors or their representatives must not injure or deface the walls or floors of the building. When such damage occurs, the exhibitor is liable to the owner of the property so damaged.

Hospitality suites: Hospitality suites must be scheduled so as not to conflict with any scheduled conference activities and be approved by AICPA staff. Publicity for hospitality suites is the responsibility of the suite host and must comply with these Rules and Regulations.

Cancellation of exhibit space: Cancellations received 60 days or more prior to the conference will entitle the exhibitor to a refund minus 10 percent (10%) of the exhibit fee. No refunds will be given on cancellations received fewer than 60 days before the conference. All cancellation requests must be made in writing to Direct Sales via fax 888.316.9536 or email amorris@morrismarketinginc.com.

Termination of exhibit: In the event the premises where the exhibit is to be held, in the sole determination of the AICPA, become unfit for occupancy or are substantially interfered with by reason of picketing, strike, embargo, injunction, act of war, act of God, fire, emergency declared by any government agency or any other act beyond the control of the AICPA, this agreement may be terminated by the AICPA. In the event of such termination, the exhibitor waives any and all damages and agrees that the AICPA may, after deducting all costs and expenses including a reserve for claims, refund to the exhibitor as and for complete settlement and discharge of all said exhibitor's claims and demands his pro rata amount of all funds paid by all exhibitors.

Liability: The exhibitor assumes entire responsibility and hereby agrees to protect, indemnify, defend and save the AICPA, the owner of the host facilities, and their respective employees and agents harmless against all claims, losses and damages to persons or property, governmental charges or fines and attorneys' fees arising out of or caused by the exhibitor's installation, removal, maintenance, occupancy, or use of exhibition premises or any part thereof, excluding any such liability caused solely by the gross negligence of the owner of the host facilities, its employees and agents.

In addition, the exhibitor acknowledges that the AICPA and the owner of the host facilities do not maintain insurance covering the exhibitor's property, and it is the sole responsibility of the exhibitor to obtain business interruption and property damage insurance covering such losses by the exhibitor.

Neither party shall be liable to the other for any special, indirect, incidental, consequential, punitive or exemplary damages or loss, nor any lost profits, savings, or business opportunity. With respect to this agreement in general, the liability of AICPA and its personnel shall not exceed the total amount of fees actually paid to AICPA under this agreement. A claim for the return of fees shall be the exclusive remedy for any damages. The limitation of liability set forth in this paragraph is intended to apply to the full extent allowed by law, regardless of the grounds or nature of any claim asserted and shall survive termination of this agreement.

Interpretation and amendments: AICPA reserves the right to interpret or amend these Rules and Regulations as it deems proper to ensure the success of the exhibition and further the educational purposes of the AICPA.

Initials of exhibiting company representative