



Connect. Engage. Impact.

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# 2020

## Conference Sponsorship Opportunities

## The Value

Founded more than seven decades ago, Tax Executives Institute is the preeminent association of in-house tax professionals worldwide. According to *Tax Business* magazine, TEI represents "the biggest, richest, and most influential group of taxpayers in the world." The Institute's 7,000 members work for 3,000 of the largest companies in North America, Latin America, Europe, and Asia, and they participate in a wide array of educational, networking, and advocacy activities.

TEI members are a prime market for most tax-service providers. Firms can "make their mark" and place themselves in front of TEI members in many ways, including speaking, partnering with TEI on webinars, writing articles for *Tax Executive* magazine, advertising in the magazine (which ensures that their name and message are never far from TEI's 7,000 members) and hosting receptions in conjunction with Institute meetings. Conference sponsorship combines these opportunities, and adds many benefits at a significant savings.

By becoming a sponsor of the Institute's conferences, your firm can guarantee that its name, its support for, and its commitment to TEI's educational, networking, and advocacy efforts are always on display. Firms that bundle their Midyear and Annual sponsorships receive a significant discount. (A single payment must be received for the entire amount.) In addition, firms that have sponsored TEI continuously since March 2015 are eligible for an additional \$5,000 Appreciation Discount when they renew at the Platinum level.

## 2019 Annual Conference Sponsors

Fifty firms participated in the 2019 Annual Conference, held in New Orleans, LA, in October, 2019. They took advantage of, and capitalized on, the opportunity to have one-on-one time with decision makers in the corporate tax space:

### PLATINUM SPONSORS

Andersen  
Baker & McKenzie  
Bloomberg Tax  
CSC Corptax  
Deloitte Tax LLP  
Ernst & Young LLP

### GOLD SPONSORS

ADP  
Alteryx  
Aptis Global LLC  
Avalara CertCapture  
Crowe LLP  
Dixon, Hughes, Goodman LLP  
DLA Piper LLP (US)  
Fenwick & West LLP  
Forte International Tax LLC

### SILVER SPONSORS

Alvarez & Marsal Taxand, LLC  
Crowell & Moring LLP  
DST Advisory Group  
Reed Smith LLP

### BRONZE SPONSORS

Alston & Bird LLP  
Covington & Burling LLP  
Holland & Hart LLP  
Ivins, Phillips & Barker  
King & Spalding LLP  
Kostelanetz & Fink LLP

### Thomson Reuters | TEI's Exclusive Affinity Partner

Eversheds Sutherland LLP  
Grant Thornton LLP  
KPMG LLP  
Mayer Brown LLP  
PricewaterhouseCoopers LLP  
Vertex, Inc.

Foss and Company  
Latham & Watkins LLP  
McDermott Will & Emery LLP  
Morgan, Lewis & Bockius LLP  
PowerPlan, Inc.  
RSM US LLP  
Skadden, Arps, Slate, Meagher & Flom LLP  
Tax Talent  
XCM

Sidley Austin LLP  
Step Up For Students  
Weil, Gotshal & Manges

Morrison & Foerster LLP  
Osler, Hoskin & Harcourt LLP  
Pepper Hamilton LLP  
Thompson & Knight LLP  
True Partners Consulting LLC  
White & Case LLP

## The Benefits

### **PLATINUM** | All of the below, plus

- ▶ Full-page, color advertisements in every issue of *Tax Executive* and final Conference program
- ▶ Five tickets to Conference Monday evening event
- ▶ Preliminary attendee list provided 2 weeks before the Conference (including email addresses) with permission to send one mass email before each Conference
- ▶ One email (distributed by TEI, at timing to be determined) to the TEI membership
- ▶ Set of handout materials from each Conference

### **GOLD** | All of the below, plus

- ▶ Exhibit space at each Conference
- ▶ One full-page, color advertisement (in place of half-page ad) in *Tax Executive* and the final Conference program, plus 15% discount on additional paid advertisements
- ▶ Opportunity to register firm's tax professionals for selected Institute courses and seminars
- ▶ Acknowledgment from dais during the Conference

### **SILVER** | All of the below, plus

- ▶ Opportunity to purchase exhibit space, subject to certain limitations
- ▶ One half-page, color advertisement in one issue of *Tax Executive* for each Conference
- ▶ One half-page, color advertisement in final program for each Conference

### **BRONZE** | All of the below

- ▶ Acknowledgment in preliminary program for each Conference
- ▶ Acknowledgment in one issue of *Tax Executive* for each Conference
- ▶ Opportunity to purchase "official sponsor" advertisement in *Tax Executive*
- ▶ Acknowledgment in final program for each Conference
- ▶ In conjunction with any social event hosted by sponsor, permission to place a sign (subject to hotel's rules), access to TEI room block (to arrange "door drop"), and inclusion of event on list distributed to registrants
- ▶ Listing of TEI's 57 Chapter Presidents, 11 Regional Vice Presidents, and Committee Chairs
- ▶ Acknowledgment and link (with sponsor logo) on [www.tei.org](http://www.tei.org) (from date of payment until one month after conference); permission to include link to TEI website on the sponsor's site
- ▶ Final attendance list (including email addresses) with permission to send one mass email message to participants within one month of each conference (with advance approval of content)
- ▶ Logo and link to website of your choice on TEI's Conference microsite
- ▶ Acknowledgment on sponsor poster at Conference
- ▶ Opportunity to contribute "Ask the Expert" columns for *Tax Executive* magazine (email [lsamuels@tei.org](mailto:lsamuels@tei.org) for details)

All benefits are subject to certain terms and conditions. Please contact Eli J. Dicker ([edicker@tei.org](mailto:edicker@tei.org); 202.464.8354) or Lisa Samuels ([lsamuels@tei.org](mailto:lsamuels@tei.org); 202.464.8340) for details.



## Terms & Conditions

### SPONSOR EXHIBITS

Platinum and Gold Sponsors are eligible to set up a table-top exhibit during the sponsored event. Silver sponsors may exhibit, subject to availability and the payment of an additional fee.

- ▶ Each sponsor's exhibit will consist of a 6' x 30" banquet-skirted table. The precise location of the exhibit, as well as the color of the skirting, will be determined at a later time. Two chairs, a trash can, and a sign with your firm's name will be included.
- ▶ Exhibits may feature any type of material (brochures, CDs, food items, etc.), and computer demonstrations are permitted. Large portable booth exhibits and large displays are not permitted. Displays must sit on the table and not extend beyond the sides of the table. Sponsors may hold drawings, but giveaways may not feature TEI's name or logo without advance written approval.
- ▶ Arrangements may be made with the Grand Hyatt Washington for equipment rental, tele-communications services, and shipping. Order forms will be provided at a later date. The cost of these services will be at the sponsor's expense.
- ▶ Exhibits may be set up any time after Noon on Sunday, March 22, and must be complete by 6:00 pm. Exhibits must remain set through to the conclusion of the exhibit program at, approximately, 4:00 pm on Tuesday, March 24.
- ▶ Sponsors may have no more than two representatives at their exhibit at any time.

A firm's not adhering to these rules may lead to cancellation of its exhibit (during the Conference) and forfeiture of its sponsorship/exhibit fee.

### ATTENDANCE POLICIES

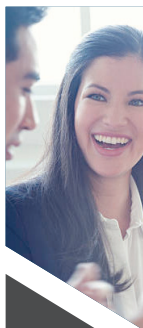
To ensure the optimal networking experience for our members, sponsors may not register for or attend any Conference session. Sponsor representatives are welcome, however, to participate in the continental breakfasts and refreshment breaks, but attendance at meal functions is limited to Conference registrants and Conference speakers.

### AFFILIATED EVENTS

Sponsors may host social events during the Conference, but no affiliated event (including private dinners) may be held in conflict with any TEI function. TEI will be hosting a reception on Tuesday evening, so sponsors are welcome to schedule dinners, etc., after 7:30 pm. Because TEI is committed to maintaining the professional focus and integrity of the Conference, we ask to be informed in advance of all sponsor-hosted events, regardless of their location.

### MISCELLANEOUS

- ▶ All signage at Conference hotel is subject to hotel and fire marshal rules and regulations.
- ▶ All communications with Conference registrants are subject to TEI's advance approval.



## 2020 Rates

### PLATINUM

**2020 Midyear & Annual Conferences (Bundled) \$88,500**

*\$5,000 Appreciation Discount available to firms that have been continuous sponsors since March 2014 – call for confirmation of eligibility.*

### GOLD

**2020 Midyear & Annual Conferences (Bundled) \$60,000**

2020 Midyear Conference \$34,000

2020 Annual Conference \$34,000

### SILVER

**2020 Midyear & Annual Conferences (Bundled) \$37,000**

2020 Midyear Conference \$21,500

▶ Exhibit Space Upgrade option (additional) \$ 9,500

2020 Annual Conference \$21,500

▶ Exhibit Space Upgrade option (additional) \$ 9,500

Exhibit space for the 2020 Midyear Conference cannot be reserved by Silver sponsors until January 31, 2020, and exhibit space for 2020 Annual Conference (including for bundled Silver sponsors) may not be reserved until July 31, 2020. Payment before these times will establish priority among respective classes of sponsors. Payment from Platinum or Gold sponsors after these times will NOT accord them priority over paid Silver sponsors with exhibits.

### BRONZE

**2020 Midyear & Annual Conferences (Bundled) \$25,000**

2020 Midyear Conference \$15,000

2020 Annual Conference \$15,000

*\*Bronze sponsors are not eligible for exhibit space.*

## Sponsorship Enhancements

Add any of these a *la carte* branding opportunities to **maximize your profile** throughout the conference.

### **BAGS – \$10,000** ★ *Exclusive Opportunity*

This is a great opportunity to give attendees something to hold on to! Each Conference attendee will receive a totebag, with your name and logo printed on it, along with the conference branding. To double your benefit, you'll also be able to place an insert into the bag.

### **PROGRAM COVER WRAP – \$10,000** ★ *Exclusive Opportunity*

Be seen by every attendee at the conference by having your firm featured on the Midyear Conference program. Used multiple times a day by participants, the program book features a complete list of sessions and sponsors.

### **CHARGING STATION – \$8,000** ★ *Exclusive Opportunity*

Prominently feature your firm, with both a static poster and a video presentation, at a charging station located next to your exhibit. Research shows that participants will spend 7-12 minutes at a charging station, giving you an extended opportunity to interact with attendees.

### **WiFi – \$15,000**

Highlight your firm or service through our exclusive wireless network. Signage throughout the conference will acknowledge your sponsorship, and your logo will be placed on the login page.

### **PRE-REGISTRANT LIST – \$3,000**

Want to reach out to attendees prior to the event, but not a Platinum sponsor? Now you can purchase a pre-registrant list, available 2 weeks prior to the Conference, which includes a license for one-time email communication to attendees.

### **BAG INSERTS – \$2,500**

The best way to get your information into the hands of every attendee! We will include your insert featuring your services and expertise, or simply inviting attendees to stop by your booth.

## RESERVATIONS

Prices guaranteed until December 31, 2019; for instructions on paying via wire transfer or sponsoring subsequent conferences, please contact TEI.

*(fee must be received as single payment to secure bundling discount)*

(mark your choice(s))

<b>PLATINUM</b>	<b>2020 Midyear &amp; Annual Conferences (Bundled)</b>	<b>\$88,500</b>	<input type="checkbox"/>
	<i>\$5,000 Appreciation Discount available to firms that have been continuous sponsors since March 2014 – call for confirmation of eligibility.</i>		
<b>GOLD</b>	<b>2020 Midyear &amp; Annual Conferences (Bundled)</b>	<b>\$60,000</b>	<input type="checkbox"/>
	2020 Midyear Conference	\$34,000	<input type="checkbox"/>
	2020 Annual Conference	\$34,000	<input type="checkbox"/>
<b>SILVER</b>	<b>2020 Midyear &amp; Annual Conferences (Bundled)</b>	<b>\$37,000</b>	<input type="checkbox"/>
	2020 Midyear Conference	\$21,500	<input type="checkbox"/>
	▶ Exhibit Space Upgrade option (additional)	\$ 9,500	<input type="checkbox"/>
	2020 Annual Conference	\$21,500	<input type="checkbox"/>
	▶ Exhibit Space Upgrade option (additional)	\$ 9,500	<input type="checkbox"/>
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<b>BRONZE</b>	<b>2020 Midyear &amp; Annual Conferences (Bundled)</b>	<b>\$25,000</b>	<input type="checkbox"/>
	2020 Midyear Conference	\$15,000	<input type="checkbox"/>
	2020 Annual Conference	\$15,000	<input type="checkbox"/>

## PAYMENTS

Send completed form and payment. For ACH Transaction/Wire Transfers please call for instructions. For Credit Card payments please call to request an invoice.

By mail

Tax Executives Institute, Lockbox 9407 PO Box 70280, Philadelphia, PA 19176-0280.  
Payable to Tax Executives Institute.

## SPONSOR INFORMATION

Primary Contact Name \_\_\_\_\_  
 Company \_\_\_\_\_  
 Mailing Address \_\_\_\_\_  
 City \_\_\_\_\_  
 State/Province \_\_\_\_\_ Zip/Zone \_\_\_\_\_  
 Telephone \_\_\_\_\_ Fax \_\_\_\_\_  
 Email \_\_\_\_\_

Does the firm have a preference for how it is referred to in acknowledgments, educational programs, etc. (i.e., a "brand name" or legal entity name that TEI should use for all purposes)?  
 In the absence of a stated preference, TEI will use the sponsor's formal name.

If yes, please list: \_\_\_\_\_

## ADDITIONAL INFORMATION

Please provide additional contact information. These names should be the individual in your firm (or outside consultant) who will have responsibility for managing the area indicated.

**For Advertisements**  
 (Tax Executive or Program Book)

Name \_\_\_\_\_ Phone \_\_\_\_\_  
 Email \_\_\_\_\_

**For Exhibits** (if applicable)

Name \_\_\_\_\_ Phone \_\_\_\_\_  
 Email \_\_\_\_\_

**General Sponsorship Matters**  
 (Secondary contact information)

Name \_\_\_\_\_ Phone \_\_\_\_\_  
 Email \_\_\_\_\_