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**Connect. Engage. Impact.**

# 2024-2025

## Tax Executives Institute

### Sponsorship Opportunities

**2025 SPONSORSHIP PROSPECTUS**

# The Value

**“TEI has a fantastic membership of sophisticated tax people...and that is just spot on with the people that I want to connect with.”**

Founded nearly eight decades ago, Tax Executives Institute is the preeminent association of in-house tax professionals worldwide. The Institute’s 6,500 members work for 2,900 of the largest companies in North America, South America, Europe, and Asia, and they participate in a wide array of educational, networking, and advocacy activities.

TEI sponsors can “make their mark” and place themselves in front of members in multiple ways. Opportunities include speaking at conferences, seminars, and courses, partnering on webinars, providing content for TEI’s *Thought Leadership Bulletin*, and writing articles for and advertising in *Tax Executive* magazine.

We have structured these benefits to connect you, in an impactful way, with our members throughout the year, leveraging multiple touch-points and TEI platforms.

The global economic outlook has only heightened the imperative for you, leaders of the tax advisory and tax technology communities, to have your firm’s name, its support for, and its commitment to TEI’s educational, networking, and advocacy efforts always on display. We are excited to offer several new and enhanced sponsorship benefits that will provide you with a steady presence before the Institute, our regions, and chapters.

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# Sponsors

## TEI'S EXCLUSIVE AFFINITY PARTNER

Thomson Reuters

### PLATINUM

ADP Tax Credit Services  
Andersen  
Bloomberg Tax  
CAC Specialty  
Crowe LLP  
CSC Corptax  
Deloitte Tax LLP  
Ernst & Young LLP  
Eversheds Sutherland (US) LLP  
FORVIS LLP

Grant Thornton Advisors LLP  
KPMG LLP  
MASSIE R&D Tax Credits  
Mayer Brown  
Morgan, Lewis & Bockius LLP  
PwC  
RSM UP LLP  
Ryan  
Vertex, Inc.  
Vinson & Elkins

### GOLD

Asbury Law Firm  
Baker McKenzie  
Kirkland & Ellis  
Latham & Watkins LLP

Lockton  
Reunion  
Riveron  
Sovos Compliance

### SILVER

Alvarez & Marsal Tax  
Aon  
Avalara  
BakerHostetler LLP  
CLA (CliftonLarsonAllen)  
Crowell & Moring LLP  
DST Advisory Group  
Exactera  
Fonoa  
Forte International

Foss & Company  
insightsoftware  
Miller & Chevalier, Chartered  
Reed Smith LLP  
Skadden, Arps, Slate, Meagher & Flom LLP  
Step Up For Students  
Stonehenge Capital  
Tax Advisors Group  
Weil, Gotshal & Manges

### BRONZE

Advantage Capital  
Alston & Bird  
Baker Tilly US  
Bellus Ventures  
Blank Rome  
Borden Ladner Gervais LLP  
DLA Piper US LLP  
FASKEN  
Foxwood Tax Search  
Greenberg Traurig  
Holland & Hart  
Holland & Knight  
Ivins, Phillips & Barker, Chartered

King & Spalding  
Loyens & Loeff (USA) B.V.  
McCarthy Tetrault  
McDermott Will & Emery  
Morrison & Foerster  
Norton Rose Fullbright US LLP  
Pillsbury Winthrop Shaw Pittman LLP  
Sidley Austin LLP  
Troutman Pepper  
Valuation Research Corporation  
Winston & Strawn  
Wolters Kluwer

# What our sponsors are saying

“As a specialized firm in a niche market, our platinum sponsorship with TEI reflects the tremendous value they bring. We’ve written articles for *Tax Executive* emphasizing the significance of R&D tax credits at national events. With TEI’s support, we’ve had the unique advantage of reaching out to their members while amplifying our audience tenfold.”

Jason Massie | MASSIE R&D Tax Credits

“TEI conferences afford a tremendous opportunity for us to network with our clients and prospects in one place.”

Carolyn Melrose | Eversheds Sutherland

“We have realized tremendous value from sponsoring the Institute-level conferences. The ability to connect to the leading tax professionals in person has been invaluable in growing our tax insurance practice.”

Matt Movafaghi | CAC Specialty

“We sponsor TEI events for the invaluable networking with industry leaders. We’re able to talk, in-person, to many of our clients, prospects, and friends all in one place”

Jonathan Adelson | Valuation Research Corporation (VRC)

“Our TEI sponsorship provides us the opportunity to connect with our clients and other tax professionals through speaking and exhibiting at conferences and writing articles for *Tax Executive*. TEI fosters a great community for in-house tax professionals, and we’re proud to be a longtime sponsor of the organization.”

Megan Egan | Baker McKenzie

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# The Benefits

	Platinum	Gold	Silver	Bronze	Tax Technology Seminar	
<b>Access to Members: Email</b>						
<b>Enhanced Benefit</b>	<p>Preliminary attendee list provided 4, 3, 2 and 1 week(s) before the Midyear and Annual Conferences with permission to send one email to each attendee before each Conference</p>	✓				
<b>NEW!</b>	<p>Preliminary attendee list (without emails) provided 2 weeks before the Midyear and Annual Conferences</p>		✓			
	<p>Final attendance list for Midyear and Annual Conferences (without emails) and one email to participants within one month of each conference (distributed by TEI)</p>	✓	✓	✓	✓	
	<p>One email per calendar year to the TEI membership (distributed by TEI, at timing to be determined, HTML and opt-out required)</p>	✓				
	<p>Listing of TEI's 56 Chapter Presidents, 11 Regional Vice Presidents, and Committee Chairs</p>	✓	✓	✓	✓	
	<p>Preliminary attendee list provided 2 weeks before the Tax Technology Seminar (without emails) and one email to each attendee before the Seminar (distributed by TEI)</p>					✓
	<p>Final attendance list for Tax Technology Seminar (without emails) and one email to participants within one month of Seminar (distributed by TEI)</p>					✓
<b>Access to Members: Networking</b>						
	<p>Tickets for non-speakers to attend Welcome and Grand networking receptions at the Midyear and Annual Conferences</p>	✓ 5	✓ 3	✓ 2	✓ 1	
	<p>Tickets for non-speakers to attend Welcome and Networking receptions at the Tax Technology Seminar</p>					✓ 3
<b>Exhibits and Lead Capture</b>						
<b>Enhanced Benefit</b>	<p>In-person exhibit with sales lead capture and tracking app at Midyear and Annual Conferences (Key: ★ Premium Placement, \$ Additional Cost)</p>	✓ ★	✓	✓ \$		
	<p>In-person exhibit with sales lead capture and tracking app at Tax Technology Seminar</p>					✓
<b>Thought Leadership</b>						
	<p>Opportunity to host page in Chapter   Sponsor Connection Portal for establishing relationships and engagements with TEI chapters and regions</p>	✓	✓	✓	✓	
	<p>Opportunity to include content from firm's website in TEI's <i>Thought Leadership Bulletin</i> (Key: # Submissions per month)</p>	✓ 4	✓ 4	✓ 2	✓ 2	

# The Benefits

	Platinum	Gold	Silver	Bronze	Tax Technology Seminar
<b>Advertising in Tax Executive</b>					
Full-page, color advertisements in every issue of <i>Tax Executive</i>	✓				
Two full-page, color advertisements in <i>Tax Executive</i> per year plus 15% discount on additional paid advertisements		✓			
Two half-page, color advertisements in <i>Tax Executive</i> per year			✓		
Sponsorship acknowledgment in four issues of <i>Tax Executive</i>	✓	✓	✓	✓	
Sponsorship acknowledgment in one issue of <i>Tax Executive</i>					✓
<b>Brand Amplification</b>					
Ad on Midyear and Annual Conferences' app	✓	✓	✓		
Logo and link to website of your choice on TEI's Midyear and Annual Conferences' microsite and/or app	✓	✓	✓	✓	
Acknowledgment and link (with sponsor logo) on TEI's website	✓	✓	✓	✓	
Logo and link to website of your choice on Tax Technology Seminar microsite and app					✓

All benefits are subject to terms and conditions.  
 Please contact Amanda Sturdevant, Sponsor Relations Director, [asturdevant@tei.org](mailto:asturdevant@tei.org), for details.

# 2024 - 2025 Conferences

TEI's Midyear and Annual Conferences, which take place each spring and fall, are the highlights of TEI's educational calendar. These conferences offer multiple tracks of substantive programming with a range of plenary and concurrent sessions focusing on U.S. federal and international tax, and state taxation, as well as complementary tracks devoted to IRS administrative affairs, tax technology, and financial reporting matters. The Midyear and Annual Conferences draw hundreds of senior in-house tax professionals, TEI's chapter, regional, and Institute leaders, government representatives, practitioners, and service providers.

- 79th Annual Conference  
October 27-30, 2024  
San Antonio, TX



- 75th Midyear Conference  
March 16-19, 2025  
Washington, DC



In addition, TEI organizes various educational seminars, courses, and webinars at the Institute level throughout the year. Its 56 chapters and 11 regions also organize various conferences and single-day sessions for our members worldwide.

The full Institute-level calendar, which is updated regularly, is accessible at:  
<https://www.tei.org/events-education/events>

**Sponsorship with TEI is a holistic and strategic year-long partnership between our organizations. Together, we will focus on understanding your firm's practice goals and assist with making connections at events that are beneficial to you and our members throughout the global TEI organization.**

# Tax Technology Seminar

2025 SPONSORSHIPS

Sponsors seeking to engage with in-house tax professionals and tax technologists may also secure an exhibit at TEI's 2025 Tax Technology Seminar on a space-available basis.

The Tax Technology Seminar brings together hundreds of in-house tax professionals, tax technologists, service providers, and technology companies each year. The Seminar features panels, roundtables, and workshops to survey technology and automation tools, trends, and strategies to elevate the tax function, making this annual seminar a must-attend event for in-house professionals.

As with past years, the 2025 Seminar will facilitate the interactivity, engagement, and networking opportunities that made prior year seminars a resounding success, including a robust exhibit hall that allows participants to experience new technology tools and connect directly with service providers and software companies.

Sponsors exhibiting at the Tax Technology Seminar receive an array of benefits, including attendee lists, post-event emails sent upon request, in-person tabletop exhibits and sales lead capture software, the opportunity to attend networking sessions, and recognition on the Tax Technology Seminar microsite, app, and *Tax Executive*. Space is limited, and general sponsors will be given priority to exhibit at the Tax Technology Seminar.

The 2025 Tax Technology Seminar will be held on May 5-8, 2025, at the Hyatt Regency Lake Washington at Seattle Southport.

## 2024 TAX TECHNOLOGY SEMINAR EXHIBITORS

### TEI'S EXCLUSIVE AFFINITY PARTNER

#### Thomson Reuters

Alvarez & Marsal Tax, LLC

Avalara

Baker Tilly US

BDO USA, LLP

Bloomberg Tax

CFO Services

Crowe LLP

CSC Corptax

DataSnipper Inc

Deloitte Tax LLP

DuCharme, McMillen & Associates, Inc.

Ernst & Young LLP

EXA AG

Exactera

Fonoa Technologies Ltd.

Forte International

Forvis Mazars

Grant Thornton LLP

insightsoftware

K1X inc

KPMG LLP

Loctax

MASSIE R&D Tax Credits

PwC

Riveron

RSM US LLP

tax.com

Tax Advisors Group Inc

Vertex, Inc.

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## TERMS & CONDITIONS

TEI's sponsorship program operates on an annual basis, with benefits accruing for 12 months from the date of commitment. Firms committing to multiple years of sponsorship are entitled to receive the rates in effect at the time of commitment for the full commitment period. We welcome the opportunity to discuss the billing arrangement that works best for your firm.

### IN-PERSON EXHIBITS

Platinum and Gold Sponsors are entitled to set up a table-top exhibit during the Midyear and Annual Conferences. Silver sponsors may exhibit, subject to availability and the payment of an additional fee. Sponsors selecting the Tax Technology Seminar add-on are also entitled to exhibit at those events.

- Each sponsor's exhibit will consist of a 6' banquet-skirted table. The precise location of the exhibit, as well as the color of the skirting, will be determined at a later time. Preferences are based on sponsorship level and join/renewal dates. Two chairs, a trash can, and a sign with your firm's name will be included. Booth displays may not extend beyond 8 feet.
- Exhibiting sponsors will be provided with complimentary sales lead capture software, enabling them to easily scan attendees' badges to add them to their firm's email distribution and sales tracking lists with proper disclosures and consent. We encourage exhibiting sponsors to feature computer demonstrations and a variety of handouts and materials, such as brochures, publications, food items, raffles, and give-aways. Sponsors may hold drawings, but giveaways may not feature TEI's name or logo without advance written approval.
- Arrangements may be made with the official decorating company for equipment rental, telecommunications services, and shipping. Order forms will be provided at a later date. The cost of these services will be at the sponsor's expense.
- Details for the event set up and shipping logistics will be provided at a later date.
- Sponsors may have no more than two representatives at their exhibit at any time.
- Sponsors are required to comply, at their own expense, with any rules or requirements conference or seminar venues may have for exhibitors. This may include, for example, providing proof of insurance coverages that name the venue and its related entities as additional insureds under exhibitors' insurance policies.

### EMAIL & PRIVACY RIGHTS

Sponsors acknowledge that they may not contact attendees with whom they do not have a pre-existing relationship except as provided in this prospectus. Sponsors using TEI's sales lead capture software must provide the necessary disclosures and obtain the attendee's consent before adding an attendee to the sponsor's contact or distribution lists. Sponsors must provide attendees with the option to opt out of future communications.

### ATTENDANCE POLICIES

In general, to ensure the optimal networking experience for our members, sponsors may not register for or attend any Conference session unless a speaker from their firm is presenting on the panel.

Exhibitors are encouraged to participate in various networking opportunities and receptions using sponsor tickets (see Benefits section above). Speakers are encouraged to attend these events, as well as lunch on the day of their session.

Exhibitor representatives may not attend Conference lunches unless they are speaking on that day of the Conference.

### LIABILITY

The aggregate liability of each party will not exceed the amount of fees paid by the sponsor to TEI under this agreement.

### CANCELLATION

If TEI cancels the Midyear or Annual Conference, TEI will refund to sponsors the portion of the sponsorship fee attributable to the canceled event. Sponsors will also be entitled to a full refund of the Tax Technology Seminar exhibitor fee if that event must be canceled. TEI reserves the right to hold a hybrid or virtual event if required.

## 2025 RATES

Prices are for one full year from the date of commitment, guaranteed until December 31, 2025. Sponsors may secure multiple year commitments at the current year rates.  
(mark your choices)

<b>PLATINUM</b>	<b>2025 Price</b>	<b>\$88,500</b>	<input type="checkbox"/>
	\$5,000 Appreciation Discount available to firms that have been continuous sponsors since March 2019 – call for confirmation of eligibility.		
<b>GOLD</b>	<b>2025 Price</b>	<b>\$62,500</b>	<input type="checkbox"/>
<b>SILVER</b>	<b>2025 Price</b>	<b>\$42,500</b>	<input type="checkbox"/>
	➤ Midyear Conference In-Person Exhibit Upgrade	\$7,500	<input type="checkbox"/>
	➤ Annual Conference In-Person Exhibit Upgrade	\$7,500	<input type="checkbox"/>
<b>BRONZE</b>	<b>2025 Price</b>	<b>\$30,000</b>	<input type="checkbox"/>
<b>TAX TECHNOLOGY SEMINAR</b>	<b>2025 Sponsor Price</b>	<b>\$7,500</b>	<input type="checkbox"/>
	<b>2025 List Price</b>	<b>\$15,000</b>	<input type="checkbox"/>

## PAYMENTS

For ACH Transaction/Wire Transfer instructions, please contact [accountspayable@tei.org](mailto:accountspayable@tei.org). Checks should be sent by mail to: Tax Executives Institute, Lockbox 9407, PO Box 70280, Philadelphia, PA 19176-0280. Checks should be made payable to Tax Executives Institute.

## SPONSOR INFORMATION

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

Does your 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)

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

For Exhibits (if applicable)

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

General Sponsorship Matters  
(Secondary contact information)

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

Thought Leadership Bulletin

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

Chapter | Sponsor Connection  
Portal

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

Requests for Session Proposals

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

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