



2014 National Conference on Philanthropic Planning

Invitation to Sponsors and Exhibitors

The Partnership for Philanthropic Planning looks forward to welcoming hundreds of your clients and prospects to the 2014 National Conference on Philanthropic Planning. We invite you to join the excitement at the Anaheim Marriott, October 14-16. NCPP 2014 will be your best face-to-face marketing opportunity this year!



NEW THIS YEAR!

- **Tote bag insert**
- **Advertise in printed program**
- **Exhibitor Lounge**
- **Education track sponsorships**

Tracks:

- **Planned Gift Specialists:** This track is for attendees who manage relationships with traditional planned gift prospects. These planners may also serve as coaches or trainers for fundraisers in other development departments.
- **One-Person/Small Shop Development Officers:** This track provides gift planning strategies appropriate for attendees who are responsible for all types of fundraising in their organizations.
- **Major and Principal Gift Officers:** This track is for attendees who would like to enhance their ability to offer planned gift options to major gift donors and high net worth prospects, including blended gifts and unique strategies to meet donor goals.
- **Professional Development for Advisors:** This track allows advisors to present technical information and skills coaching to their peers, with the goal of integrating philanthropic planning into estate and financial planning practices.
- **Executive Briefing:** This track provides current information on trends, demographics, legislative developments and other issues or events that affect philanthropic planning and the goals and performance of fundraisers.

2014 Sponsor & Exhibitor Opportunities

Exhibit Package: \$2,500

The 2014 conference exhibit package includes:

- 10' X 10' exhibit booth, including drape, signage, 6' table, two side chairs and wastebasket.
- Complimentary full-conference registration for one person (additional exhibit personnel are required to register and pay appropriate fees).
- Listing and link on conference web site.
- Listing on conference mobile app.
- Special recognition on screen at networking luncheon, Wednesday, October 15.
- Complimentary access to attendee mailing list data file.

Corporate Sponsorship: \$1,500

A corporate sponsorship does not include an exhibit booth, but offers the following benefits:

- Complimentary full-conference registration for one person.
- Logo on exhibit hall entrance signs.
- Logo and link on email registration invitations.
- Logo and link on conference web site.
- Logo featured on conference mobile app.

Event and Amenity Sponsorships

In addition to specific benefits noted below, all event and amenity sponsorships include the following:

- Complete 10' x 10' exhibit booth package.
- Brief company profile in printed program.
- Logo on exhibit hall entrance signs.
- Logo and link on email registration invitations.
- Logo and link on conference web site.
- Logo featured on conference mobile app.

\$10,000 Mobile App

- Banner with your company's logo will appear in prime position on the mobile app.
- Back cover ad in printed program.
- One mobile alert per day to all attendees.

\$10,000 WiFi

- Your company featured throughout conference meeting/exhibit space.
- Tent signs with your company logo on attendee discussion area & charging station tables.
- Banner with your company's logo will appear (along with PPP's) on the conference TweetWall.

\$8,000 Opening Dinner

- VIP seating for two individuals at opening dinner.
- Brief intro of your company by conference chair.
- Introduction of opening dinner speaker by a representative of your company.
- Company name/logo featured on screen at opening dinner.

\$7,000 Closing Luncheon

- VIP seating for two individuals at closing luncheon.
- Brief intro of your company by conference chair.
- Introduction of closing luncheon speaker by a representative of your company.
- Company name/logo featured on screen at closing luncheon.

\$6,000 Name Badge

- Company name/logo printed on name badge holders distributed to all attendees (one-color imprint).

\$6,000 Tote Bag

- Company name/logo printed on tote bags distributed to all attendees (one-color imprint).

\$6,000 Hotel Keycard

- Company name/logo printed on guestroom keycards (two-color imprint).

\$5,000 Luggage Tag

- Company name/logo printed on luggage tags distributed to all attendees (one-color imprint).

\$5,000 Pen

- Company name/logo printed on pens distributed to all attendees (one-color imprint).

\$5,000 Opening Reception

- Company logo/special thanks on signs in exhibit hall during reception.
- Cocktail napkins with one-color imprint of your company logo used at food and beverage stations.

\$4,000 Partners Reception

- Company logo/special thanks on signs at VIP reception following opening dinner.

\$4,000 Wednesday Breakfast

- Company logo/special thanks on signs in exhibit hall during breakfast on Wednesday.

\$4,000 Thursday Breakfast

- Company logo/special thanks on signs in exhibit hall during breakfast on Thursday.

\$4,000 Education Track (Five Available)

- Company logo/name on signs outside each breakout session in your sponsored track.
- First-choice opportunity for representatives of your company to introduce speakers at sessions in your sponsored track.
- Available tracks:
 1. Planned Gift Specialists
 2. One-Person/Small Shop Development Officers
 3. Major and Principal Gift Officers
 4. Professional Development for Advisors
 5. Executive Briefing



New This Year!

- **\$750 Tote Bag Insert:** Your company's brochure or promotional item will be inserted into tote bags distributed to all attendees.
 - Your promotional item may not duplicate items sold as sponsorships. We cannot accept pens, luggage tags, tote bags or name badge holders.
 - Item must easily fit into tote bags measuring 12" high x 12" wide x 4" deep.
 - Available to NCPP sponsors and exhibitors only.
 - Brochure/promotional item must be produced and shipped to the conference at the exhibitor's expense.
 - All items must be approved by PPP management.
- **Advertise in the Conference Printed Program** - rates are as follows:
 - \$500 full-page
 - \$250 half-page



- **March 11—24:** Event/Amenity sponsorship reservation forms accepted.
- **March 31—April 4:** Notification of sponsorship awards.
- **April 18:** 50% deposit due for all reserved sponsorships.
- **April 21:** Open registration for all remaining sponsorships and exhibit booths.
- **August 18:** Copy deadline for printed program.

Sponsor Reservations:

During the sponsor reservation period (March 11-24), supporters are welcome to submit a Sponsor Reservation Request form. Sponsorships will be awarded based on past support history and timing of the request. Remaining sponsorships and exhibits will be offered on a first come-first served basis when open registration begins on April 14.

Deposits

- April 18 50% deposit due for all reserved sponsorship packages
- July 8 Balance due on all sponsorship and exhibit packages

Cancellations

Please submit your cancellation notice to Gloria Kermeen: gkermeen@pppnet.org. Refunds will be granted according to the following schedule:

- On or before June 7.....Full refund minus 5% processing fee
- June 8 – August 18.....50% of total fee
- After August 18.....No refund

Please note:

The online registration system does not allow for partial credit card payments. If you'd like to make a deposit with a credit card, please contact Gloria Kermeen to make special arrangements: gkermeen@pppnet.org, or by telephone at 317-269-6274, x 31.

Additional notes:

- Exhibitor packages include one complimentary full conference registration. If booth attendant registrations are needed they must be purchased at the rate of \$295. This fee covers meals throughout the conference. If additional full conference registrations are needed, they may be purchased at the full conference member rate.
- Please refer to the Dates/Deadlines/Rules & Regulations document for further details.

For questions regarding PPP's Sponsor or Exhibitor Program contact:
Gloria Kermeen at (317) 269-6274 x 31, or e-mail gkermeen@pppnet.org.



2014 National Conference on Philanthropic Planning Sponsor/Exhibitor Important Dates & Deadlines

March 11 - 24	Sponsorship Reservation Request forms accepted
March 31 – April 4	Notification of sponsorship awards
April 18	Deposits due (50% of total fee) for reserved sponsorships
April 21	Open registration for remaining sponsorships & exhibit booths begins
June 8	Cancellations: Last day for 100% of total fee refund (minus 5% processing fee)
June 8	Open sponsor/exhibitor registration deposits due
July 8	Balances due for all sponsors & exhibitors
August 18	Copy deadline for printed program
August 18	Last day for 50% of total fee refund
	No refunds after this date
August 18	Early registration fee deadline for conference attendees
August 18	Excel attendee list available
Early September	Freeman to e-mail exhibitor kits
September 22	Hotel reservation cut-off
October 1	Deadline for conference attendee registration refunds
October 1	Conference registration closes
October 10	Hotel delivery deadline for tote bag inserts
October 14	Exhibit Set-up 12:00 – 5:00 pm Exhibit hall open 5:30 - 6:30pm for Opening Reception
October 15	Exhibit hall open times: 7:30 – 8:30 am 9:30 – 10:00 am 11:00 – 11:30 am 3:00 – 3:30 pm
October 16	Exhibit hall open times: 7:30 – 8:30 am 9:30 – 10:00 am 11:00 – 11:30 am
	Exhibit Teardown Times: 11:30 am – 1:30 pm Please note: Teardown is not permitted before 11:30 am.

Exhibit Rules and Regulations

- 1. CONTRACT FOR SPACE:** The registration for space and formal notice of assignment and acceptance by PPP, with full payment of rental charges, constitute a contract for the right to use this space. No exhibitor will be allowed to set up unless PPP has received payment in full.
- 2. LOCATION, DATES, & HOURS:** The exhibit location, dates, and hours will be as indicated in our Important Dates and Deadlines document. Exhibit Management reserves the right to make changes in the exhibit dates and/or hours; however, such changes will be made known as far in advance as possible.
- 3. INSTALLATION AND DISMANTLING:** Installation may begin at 12 pm on Tuesday, October 14, 2014, and should be completed no later than 5pm the same day. It is mutually agreed that it is the duty and responsibility of each exhibitor to install his or her exhibit before the opening of the exhibition. ANY space not claimed and occupied by 5pm on Tuesday, October 14 may be reassigned without refund. **The exhibitor expressly agrees not to dismantle or do any packing before 11:30 am on Thursday, October 16.** The hall must be cleared by 1:30 pm on October 16. Labor to assist in erection, assembly, dismantling, packing, and unpacking of display must be arranged through Freeman, the official show decorator. All work in connection with exhibit erection and dismantling is to be performed by union personnel carrying the appropriate union card.
- 4. USE OF SPACE:** All demonstrations or other activities must be confined to the limits of the 10' x 10' exhibit booth area. The Exhibitor shall not assign or sublet any space allotted without the written consent of PPP. In addition, sharing of exhibit space by two or more companies or firms is prohibited. It is also prohibited for exhibitors to swap booths once conference materials have been printed. The exhibitor shall not display or place any product, sign partition, apparatus, shelving, or other construction that extends more than eight (8) feet above the floor or more than three (3) feet in depth from the back wall. No interference with the light or view of other exhibitors will be permitted. Audio amplification is prohibited.
- 5. MARKETING:** Any required permit to sell and/or collect tax on products sold in the exhibit booth is the responsibility of the exhibitor. It is expressly prohibited to perform mass emails or calls from a supplied attendee list. If an exhibitor or sponsor would like to solicit attendees via postal mail, please fill out and return the attendee mailing list rental agreement.
- 6. IRREGULAR CANVASSING:** Distribution of circulars or promotional material may be made only within the booth or display area assigned to the exhibitor presenting the material, unless previous arrangements with Management have been made to distribute materials. Exhibitors may arrange with the Anaheim Marriott Hotel for mass distribution of promotional materials to guest rooms. Said materials must be approved by management. Exhibitors may also contract independently with the hotel to have items such as personal invitations or messages distributed.
- 7. RESTRICTIONS IN OPERATION OF EXHIBITS:** PPP reserves the right to restrict exhibits that because of noise, method of operation, materials, or for any other reason, become objectionable, and also to prohibit or even evict any exhibit that in the opinion of the management may detract from the general character of the exhibit hall as a whole. This reservation includes persons, things, conduct, printed material, or anything of a character that the management determines is objectionable to the exhibit. In the event of such restriction or eviction, PPP is not liable for any refunds or rentals or other exhibit expenses.
- 8. CARE OF BUILDING AND EQUIPMENT:** Exhibitors, or their guests, shall not injure or deface the walls or floors of the building, the booths, or the equipment of the booths or display areas. Nothing shall be posted on, tacked, nailed, screwed, or otherwise attached to columns, walls, floors, or other parts of the building or furniture. ANY damage in connection therewith will be at the expense of the exhibitor. All electrical wiring must conform to the Electrical Code of Anaheim, CA.
- 9. MAINTENANCE OF EXHIBITS:** All exhibits must be adequately staffed during exhibition hours. Exhibit booths may not be dismantled nor may any packing be done prior to the final closing time of the exhibit hall, at 11:30 am on Thursday, October 16.
- 10. ADMISSION:** Management shall have sole control over admission policies at all times. Management discourages children under the age of 18, including infants or children in strollers, from attending conference related events, including those in the exhibit hall. Most exhibitor packages include one complimentary full conference registration.

Booth attendant registrations may be purchased at the rate of \$295. If additional full conference registrations are needed, they may be purchased at the full conference member rate.

11. CANCELLATIONS: All cancellations must be received in writing via fax or e-mail. Phone cancellations are not accepted. Refunds will be granted according to the schedule outlined in our Important Dates and Deadlines document.

12. COMPETING EVENT: Hospitality/Meeting space in the host hotel is available for receptions, product demonstrations, meetings, etc. and must be approved by Management. Scheduling of private functions, cocktail parties or other events during exhibit hours or during any conference sessions or special functions is prohibited.

13. RULE CHANGES: Management reserves the right to modify or supplement these rules as it deems appropriate to the operation of the exhibit, and exhibitor agrees to be bound by them. Violations of any of these terms or regulations on the part of the exhibitor, its employees or agents shall, at the option of Management, constitute cause for Management to terminate this agreement, expel exhibitor from the exhibit, and exhibitor shall forfeit all fees paid to Management.

14. SELECTION OF EXHIBITORS: Only firms and organizations whose services or products are related to the purpose of PPP shall be permitted to exhibit. Management reserves the right to decline or prohibit any exhibit that in its judgment is inappropriate; this reservation being all-inclusive as to persons, things, printed matter, products, and conduct.

15. STORAGE: Storage space is not available for display material and/or show merchandise. Storage and drayage should be arranged through Feeman, PPP's exhibit service provider.

16. LIABILITY AND INSURANCE: PPP, the Anaheim Marriott Hotel, Freeman, or any other officers or staff members do not maintain insurance on behalf of exhibitors, and will not be responsible for the safety of the property of the exhibitors, including but not limited to, claims from theft, damage by flood, fire, loss, or accident. It is the sole responsibility of the Exhibitor to obtain interruption and property damage insurance covering such losses by the Exhibitor.

17. INDEMNIFICATION: The Exhibitor will not, and waives his or her right to do so, make a claim or demand against PPP, the Anaheim Marriott Hotel, Freeman, or any of their employees, representatives, or agents, for any injury including injury resulting in death, loss of or damage to property suffered or sustained by the Exhibitor or the Exhibitor's employees, representatives, agents, or invitees, or by any other person or corporation, which is based upon, arises out of, or is connected directly or indirectly with the Exhibitor's installation, removal, maintenance, occupancy, or use thereof or with the exhibition premises or part thereof.

The Exhibitor will indemnify and save harmless PPP, the Anaheim Marriott Hotel, Freeman, or any of their employees, representatives, or agents from and against any and all claims, demands, awards, including awards made under the Workers' Compensation Act or similar legislation, actions, and proceedings by whomsoever made, brought, or prosecuted, and from and against any and all loss, damages, or expenses suffered or incurred by PPP, the Anaheim Marriott Hotel, Freeman, or any of their employees, representatives, or agents, and which are based upon, arise out of, or are connected directly or indirectly with the Exhibitor's installation, removal, maintenance, or use thereof or with the exhibition premises or part thereof.



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Conference Schedule

Tuesday, October 14	
12:00 pm – 7:30 pm	Registration Open
1:00 pm – 5:00 pm	Jump Start: Gift Planning Fundamentals – additional fee required
3:00 pm – 5:00 pm	Council Conversations
3:00 pm - 5:00 pm	Leadership Institute Roundtable
5:30 pm – 6:30 pm	Grand Opening Reception in Exhibit Hall
6:30 pm – 8:30 pm	Opening Dinner with Keynote Speaker
Wednesday, October 15	
7:30 am – 5:30 pm	Registration Open
7:30 am – 8:30 am	Breakfast in Exhibit Hall
8:30 am – 9:30 am	Breakout Sessions (6 concurrent)
9:30 am – 10:00 am	Networking Break in Exhibit Hall
10:00 am – 11:00 am	Breakout Sessions (6 concurrent)
11:00 am – 11:30 am	Networking Break in Exhibit Hall
11:30 am – 12:30 pm	Breakout Sessions (6 concurrent)
11:30 am– 1:00 pm	Leadership Institute Roundtable
12:30 pm – 2:00 pm	Lunch
2:00 pm – 3:00 pm	Breakout Sessions (6 concurrent)
3:00 pm – 3:30 pm	Networking Break in Exhibit Hall
3:30 pm – 5:00 pm	Interactive Sessions (6 concurrent)
Thursday, October 16	
7:30 am – 2:00 pm	Registration Open
7:30 am – 8:30 am	Rolls and Coffee in Exhibit Hall
8:30 am – 9:30 am	IGNITE!
9:30 am – 10:00 am	Networking Break in Exhibit Hall
10:00 am – 11:00 am	Breakout Sessions (6 concurrent)
11:00 am – 11:30 am	Networking Break in Exhibit Hall
11:30 am – 12:30 pm	Breakout Sessions (6 concurrent)
12:30 pm – 2:00 pm	Moderated Affinity Lunch
2:00 pm	Conference Ends



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Freeman

Freeman is the exclusive exhibit decorating company for the 2014 National Conference on Philanthropic Planning. Your Exhibitor Package will include a 10' X 10' booth including drape, signage, a 6' table, two side chairs, and a wastebasket. Please note: In 2014, the exhibit hall is carpeted. If you'd like furnishings, or any additional accessories, you will need to order these directly through Freeman. They will e-mail the link for the exhibitor kits to all exhibitors in late August/early September. If you have any questions in the meantime, please feel free to contact Freeman's Exhibitor Services Department at:

Contact Information

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