



2011 Exhibitor & Sponsor Prospectus

AICPA Briefing on Sophisticated Tax Planning for Your Wealthy Clients

Main Conference:
November 14 – 15, 2011

Boston Park Plaza
Boston, MA



OBJECTIVES:

At the 2011 AICPA Briefing on Sophisticated Tax Planning for Your Wealthy Clients, participants will be updated on cutting edge strategies and governmental regulations that affect affluent individuals. Developed by Sid Kess, this conference features an all-star program of speakers and presenters. Hot topics include an estate tax update, tax practitioner penalties and the latest techniques for retirement planning, eldercare, estate planning, asset protection, life insurance and more

EXPECTED ATTENDANCE: 200

ATTENDEE PROFILE:

CPA s, financial planners, lawyers, insurance agents, enrolled agents, firms that have high-net-worth clients, family office managers, banks & trusts officers, wealthy clients, investment advisors, tax practitioners serving wealthy clients.

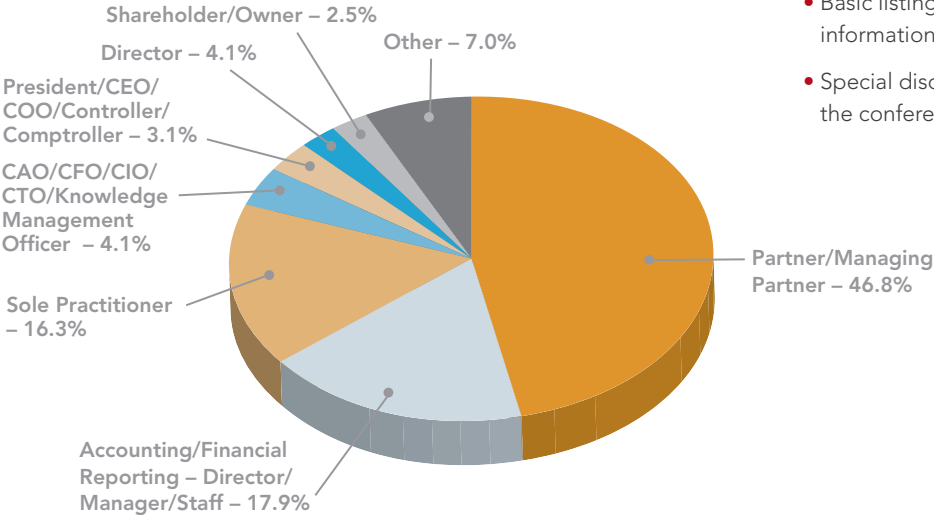


EXHIBIT SPACE RATES:

\$2,500 per tabletop space

EXHIBIT FEE INCLUDES:

- Rental of the standard display space plus one draped table, two chairs and a wastebasket
- Admission to the main conference sessions (not including pre-/post-conference workshops) for two (2) representatives from the exhibiting company with CPE credit (if CPAs) and all breakfasts, breaks, luncheons and the welcome reception.
- Pre- and post-show participant mailing list for one-time use (includes names and USPS addresses only)
- Listing in the conference program, including your company contact information and a 50-word description
- Basic listing in the online exhibitor directory featuring contact information, your logo and a link to your website
- Special discount for your customers and prospects to attend the conference

WHY SHOULD AICPA CONFERENCES BE PART OF YOUR MARKETING MIX?

No marketing mix is complete without the face-to-face component. Each conference is a prime opportunity for you to build relationships with financial decision-makers. Whether you're increasing your company's visibility through sponsorships or speaking with attendees on the show floor, our conferences bring you closer to the prospects you most want to reach.

The conference floor is your opportunity to demonstrate your strengths as a solution-provider by keeping attendees apprised of products and services that will help them grow and improve their business. Exhibits and sponsorships allow you to:

- Showcase your products and services
- Establish your company as a market and thought leader
- Build your brand recognition
- Develop new business and/or strengthen your relationship with existing customers

REACHING DECISION-MAKERS THROUGH SPONSORSHIP AND ADVERTISING

For any budget or set of marketing objectives, AICPA conferences provide a wealth of sponsorship opportunities. Some are basic enhancements. Some are highly exclusive. We'll help you customize a package that makes the most of your resources and builds the greatest return on your involvement.

GOLD – \$10,000

- Educational session speaking opportunity**:
- Full-page ad (5" x 8") in the conference program
- Logo on cover of conference program
- Insert (sponsor-supplied) in tote bag, please inquire regarding restrictions
- Three (3) additional badges for company representatives (total: 5 badges)*

** Deadline for consideration and inclusion on the program: 6/13/11

SILVER – \$7,500

- Educational session speaking opportunity **:
- Full-page ad (5" x 8") in the conference program
- Insert (sponsor-supplied) in tote bag, please inquire regarding restrictions
- Two (2) additional badges for company representatives (total: 4 badges)*

** Deadline for consideration and inclusion on the program: 6/13/11

BRONZE – \$5,000

- Half Page ad (5" x 4") in the conference program
- One (1) additional badge for attending representatives (total: 3 badges)*

All Corporate sponsorships include these standard benefits:

- Exhibit space with premier positioning and all exhibitor benefits, based on availability
- Logo on Thank You signage in exhibit hall
- Recognition as a sponsor on AV slides during session breaks
- Premium listing on the online exhibitor directory, featuring a 250-word company description, press releases or news articles, product listings with images, product videos, executive photos and bios, contact form and more
- Inclusion in the conference marketing materials, including the brochure, emails and conference website (Deadline for inclusion: 6/13/11)

*NOTE: Badges for attending sponsor representatives are for the main conference only. They do not include attendance at the Pre-conference Value-Added Workshops

TECHNOLOGY SPONSORSHIPS

Power Zone Sponsor – \$6,500

- Recharge areas for laptops and cell phones

Wi-Fi – \$8,500

USB Wands – \$7,500

NETWORKING SPONSORSHIPS

Breakfast – \$5,000

Luncheon – \$12,000

Hydration Station – \$5,000

- Logo on water bottles and signage at hydration stations

MATERIALS SPONSORSHIPS

Conference Program – \$7,500

Tote Bag – \$6,500

Lanyard – \$5,000

CONFERENCE PROGRAM AD SPACE & TOTE BAG INSERTS

Pricing (all ads are B/W)	Rate
• Inside Front Cover	\$1,500
• Inside Back Cover	\$1,250
• Inside Program Full Page	\$1,000
• Inside Program Half Page	\$750
• Tote Bag Inserts	\$2,000

Additional sponsorship opportunities are available.

Alan Morris, Morris Marketing, Inc., 800.504.4749, ext. 101, amorris@morrismarketinginc.com

Jessica Erickson, Morris Marketing, 800.504.4749, ext. 102, jerickson@morrismarketinginc.com



2011 EXHIBIT SPACE APPLICATION & CONTRACT

AICPA BRIEFING ON SOPHISTICATED TAX PLANNING FOR YOUR WEALTHY CLIENTS NOVEMBER 14 – 15, 2011 • BOSTON PARK PLAZA • BOSTON, MA

PRE-CONFERENCE LOGISTICS INFORMATION:

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

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

PUBLICITY INFORMATION:

The following information will be used for exhibitor listings in the conference program. Please **type or print clearly** and list all information exactly as it should appear for publication, including all capitalization and punctuation.

Company: _____
Address: _____
City: _____ State: _____ ZIP: _____
Country: _____
Phone: _____
Email: _____
URL: _____

EXHIBIT SPACE ASSIGNMENT / PRICING: Booth locations will be assigned based on availability at the time the contract is received. Cost is \$2,500 for a tabletop space.

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

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

CONFERENCE ADVERTISING (EXHIBITORS & SPONSORS ONLY):

	Rate
Tote Bag Insert:	<input type="checkbox"/> \$2,000
Conference Program Ad Space:	
Inside Front Cover:	<input type="checkbox"/> \$1,500
Inside Back Cover:	<input type="checkbox"/> \$1,250
Inside Full Page:	<input type="checkbox"/> \$1,000
Inside Half Page:	<input type="checkbox"/> \$750

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 is received and processed. Full payment must be received 60 days before the conference begins. **Applications received within 60 days of the conference will be invoiced immediately and must be paid in full prior to the start of the conference.** 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 TO: AICPA, Conferences, c/o Morris Marketing Inc.
22 Bayview Avenue, Manhasset, NY 11030, amorris@morrismarketinginc.com or Fax 888.316.9536.

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



2011 EXHIBITOR RULES & 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 10' x 10' 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 sixty (60) days 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. Additional badges requested by exhibitors and sponsors over and above the allotment promised as part of their contracts will be charged as follows:
 - Exhibit/Sponsor staff not attending the sessions will be either \$75 a day or \$150 for the full conference.
 - Exhibitors/Sponsors that do attend sessions for CPE are able to purchase additional conference badges for \$500 per person. This fee is for conference badges over and above the negotiated amount in the contract.
- 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 program, including your company contact information and a 50-word description;
- Basic listing in the online exhibitor directory; and
- 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 SET-UP 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 exhibits 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