



TAX EXECUTIVES INSTITUTE, INC.

The Preeminent Association of In-House Tax Professionals Worldwide

**2018
Conference Sponsorship
Opportunities**

Tax Executives Institute, Inc.
1200 G Street, N.W., Suite 300
Washington, D.C. 20005-3814
Telephone: 202.638.5601
Fax: 202.638.5607
www.tei.org • asktei@tei.org



The Value of Participation

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 2013 are eligible for an additional \$5,000 Appreciation Discount when they renew at the Platinum level.

An important part of TEI’s sponsorship initiative is a full range of acknowledgments, as well as the opportunity for sponsors to interact with TEI members (at conferences and otherwise). Thus, for each conference, acknowledgments will be included in both the preliminary and final conference programs, in *Tax Executive* magazine, and on TEI’s website, as well as at the conference itself. There will also be advertising in the Institute’s magazine (and the conference program) and a conference attendance list (including email addresses).



2018 Annual Conference Participating Sponsors

Forty-two firms participated in the 2017 Annual Conference, held in Toronto, Ontario, in October. These companies took advantage of, and capitalized on, the opportunity to have one-on-one time with decision makers in the corporate tax space:

Platinum

Thomson Reuters

TEI's Exclusive Affinity Partner

Andersen Tax
Baker & McKenzie LLP
Bloomberg BNA
Corptax, Inc.
Deloitte Tax LLP
DLA Piper LLP (US)

Ernst & Young LLP
Eversheds Sutherland (US) LLP
Grant Thornton LLP
KPMG LLP
Mayer Brown LLP
PricewaterhouseCoopers LLP
Vertex, Inc.

Gold

ADP
Bloomberg BNA Software Products
Crowe Horwath LLP
Fenwick & West LLP
Harvest Group LLC
Ivins, Phillips & Barker
Latham & Watkins LLP

Longview
Monarch Private Capital
Morgan, Lewis & Bockius LLP
RSM US LLP
Skadden, Arps, Slate, Meagher & Flom LLP

Silver

Alvarez & Marsal Taxand, LLC
Baker Hostetler LLP
Covington & Burling LLP

Crowell & Moring LLP
Sidley Austin LLP
Step Up for Students

Bronze

Alston & Bird LLP
Chartered Professional Accountants of
Canada
King & Spalding LLP
McCarthy Tetrault
Miller & Chevalier Chartered

Osler, Hoskins & Harcourt LLP
Pepper Hamilton LLP
Reed Smith LLP
Thompson & Knight LLP
Thorsteinssons LLP



The Benefits of Participation

Platinum

All of the below, plus

- Full-page, color advertisements in every issue of *Tax Executive* and final Conference program
- Five tickets to Conference closing 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 Institute courses and seminars
- Acknowledgment from dais during the Conference

New & Noteworthy for Platinum Sponsors

As TEI will no longer distribute a printed membership roster, Platinum sponsors now have the opportunity to have an email sent on their behalf to the entire TEI membership.

Email contents is subject to TEI approval; timing to be determined collaboratively.



The Benefits of Participation *(continued)*

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

- 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 56 Chapter Presidents, 11 Regional Vice Presidents, and Committee Chairs
- Acknowledgment and link (with sponsor logo) on 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 for details)

All benefits are subject to certain terms and conditions. Please contact Eli J. Dicker (edicker@tei.org) or Lisa Samuels (lsamuels@tei.org), 202.638.5601 for details.



2018 Rates

Platinum

- | | | |
|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|
| <input type="checkbox"/> | 2018 Midyear & Annual Conferences (Bundled) | \$80,000 |
| | <i>\$5,000 Appreciation Discount available to firms that have been continuous sponsors since March 2013 — call for confirmation of eligibility.</i> | |

Gold

- | | | |
|--------------------------|--------------------------------------------------------|-----------------|
| <input type="checkbox"/> | 2018 Midyear & Annual Conferences (Bundled) | \$50,000 |
| <input type="checkbox"/> | 2018 Midyear Conference | \$27,500 |
| <input type="checkbox"/> | 2018 Annual Conference | \$27,500 |

Silver

- | | | |
|--------------------------|-------------------------------------------------------------|-----------------------------|
| <input type="checkbox"/> | 2018 Midyear & Annual Conferences (Bundled) | \$30,000 |
| <input type="checkbox"/> | 2018 Midyear Conference | \$17,500 |
| <input type="checkbox"/> | 2018 Annual Conference | \$17,500 |
| <input type="checkbox"/> | Upgrade to include Exhibit Space at 2018 Midyear Conference | <i>(additional)</i> \$9,500 |
| <input type="checkbox"/> | Upgrade to include Exhibit Space at 2018 Annual Conference | <i>(additional)</i> \$9,500 |

Bronze

- | | | |
|--------------------------|--------------------------------------------------------|-----------------|
| <input type="checkbox"/> | 2018 Midyear & Annual Conferences (Bundled) | \$20,000 |
| <input type="checkbox"/> | 2018 Midyear Conference | \$12,000 |
| <input type="checkbox"/> | 2018 Annual Conference | \$12,000 |

Exhibit space for 2018 Midyear Conference cannot be reserved by Silver sponsors until January 31, 2018, and exhibit space for 2018 Annual Conference (including for bundled Silver sponsors) may not be reserved until July 31, 2018. 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.

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 directly with TEI's official exhibit contractor 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.
- Exhibits may be set up any time after noon on Sunday, March 25, and must be complete by 5:30 pm. Exhibits must remain set through to the conclusion of the exhibit program at 4 pm on Tuesday, March 27.
- 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, with the exception of the Sunday night "Welcome Reception." This reception will be held in the exhibit hall and is open to all sponsor representatives.

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 again 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.

Sponsorship Enhancements

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

BAGS* ★ Exclusive Opportunity

\$10,000

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 ★ Exclusive Opportunity

\$10,000

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 ★ Exclusive Opportunity

\$8,000

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 ★ Exclusive Opportunity

\$18,000

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

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.

Reservation, Payment and Sponsor Information Form

(Prices guaranteed until March 1, 2018; for instructions on paying via wire transfer or sponsoring subsequent conferences, please contact TEI.)

Primary Contact Person: _____

Company: _____

Address: _____

Phone: _____ Fax: _____

Email: _____

Sponsorship Level

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

Platinum

- | | | |
|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|
| <input type="checkbox"/> | 2018 Midyear & Annual Conferences (Bundled) | \$80,000 |
| | <i>\$5,000 Appreciation Discount available to firms that have been continuous sponsors since March 2013 — call for confirmation of eligibility.</i> | |

Gold

- | | | |
|--------------------------|--------------------------------------------------------|-----------------|
| <input type="checkbox"/> | 2018 Midyear & Annual Conferences (Bundled) | \$50,000 |
| <input type="checkbox"/> | 2018 Midyear Conference | \$27,500 |
| <input type="checkbox"/> | 2018 Annual Conference | \$27,500 |

Silver

- | | | |
|--------------------------|-------------------------------------------------------------|-----------------------------|
| <input type="checkbox"/> | 2018 Midyear & Annual Conferences (Bundled) | \$30,000 |
| <input type="checkbox"/> | 2018 Midyear Conference | \$17,500 |
| <input type="checkbox"/> | 2018 Annual Conference | \$17,500 |
| <input type="checkbox"/> | Upgrade to include Exhibit Space at 2018 Midyear Conference | <i>(additional)</i> \$9,500 |
| <input type="checkbox"/> | Upgrade to include Exhibit Space at 2018 Annual Conference | <i>(additional)</i> \$9,500 |

Bronze

- | | | |
|--------------------------|--------------------------------------------------------|-----------------|
| <input type="checkbox"/> | 2018 Midyear & Annual Conferences (Bundled) | \$20,000 |
| <input type="checkbox"/> | 2018 Midyear Conference | \$12,000 |
| <input type="checkbox"/> | 2018 Annual Conference | \$12,000 |

Exhibit Space is available to Silver sponsors at an additional charge; it is not available to nonsponsors or Bronze sponsors. Because exhibit space at TEI's conference is limited, priority will be based on level of sponsorship and date of payment. Exhibit space for 2018 Midyear Conference cannot be reserved by Silver sponsors until January 31, 2018, and exhibit space for 2018 Annual Conference (including for bundled Silver sponsors) may not be reserved until July 31, 2018. 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.

Payment Methods: Check (Payable to Tax Executives Institute)
ACH Transaction/Wire Transfer (Please call for instructions)
Credit Card (Please call to request an invoice)

To Submit Payment: To pay by mail, please send completed form and payment to:
Tax Executives Institute
P.O. Box 9407
Uniondale, NY 11555-9407

TEI's Federal Taxpayer ID Number is 52-0239291.

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:

- Yes _____
 No _____

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:

(In Tax Executive and in the on-site conference program.)

Name: _____

Phone: _____ Fax: _____

Email: _____

For matters relating to the exhibit (if applicable):

Name: _____

Phone: _____ Fax: _____

Email: _____

For general sponsorship matters when the primary contact is unavailable:

Name: _____

Phone: _____ Fax: _____

Email: _____

For additional information, contact Eli J. Dicker (edicker@tei.org) or Lisa Samuels (lsamuels@tei.org), 202.638.5601.