

Exhibit and sponsor
prospectus



AICPA Employee Benefit Plans Conference

May 6–8, 2019 | New Orleans, LA

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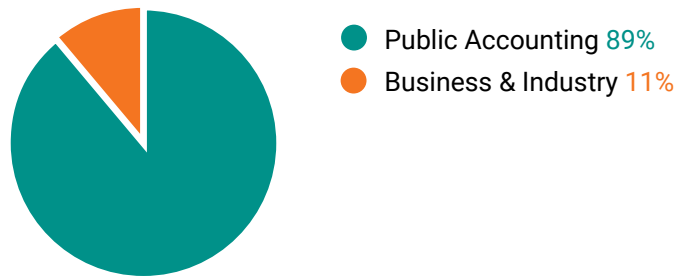
About the conference

The **AICPA Employee Benefit Plans Conference** is an unprecedented event that brings together more than 1,000 participants for a rare opportunity to network with some of the industry's highest-level professionals. This conference brings auditors, tax professionals and plan sponsors together to discuss and debate issues of the day. This is one of the few events where attendees will hear directly from the Department of Labor and IRS on changes impacting both the tax and auditing sides of employee benefit plans. Reach attendees of this well-attended event through one of the many networking opportunities throughout the conference.

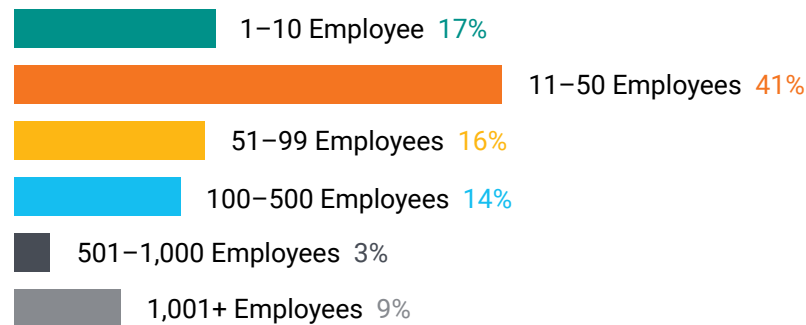
Demographics

Targeted attendees include CPAs, auditors, tax practitioners, plan sponsors and accountants, and consultants involved in the administration, tax and financial areas of employee benefit plans.

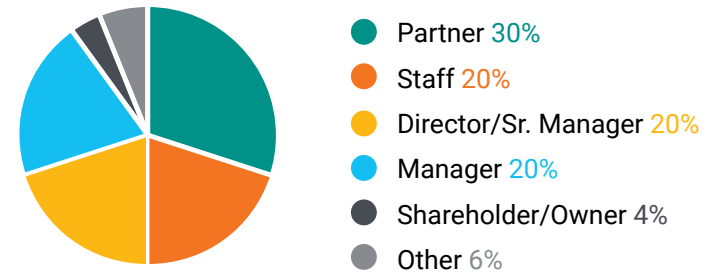
1,160 attendees:



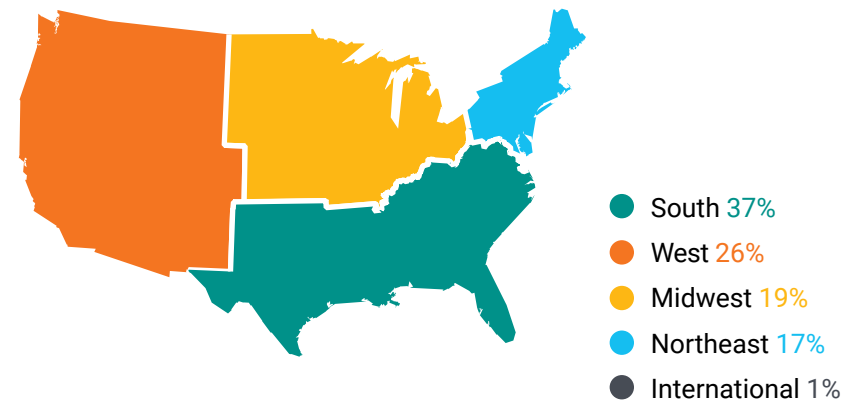
Firm size



Top titles



Attendees by region



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Reach and sell CPA professionals, auditors, plan sponsors and consultants involved in the administration, tax and financial areas of employee benefit plans with well-equipped booth space starting at only \$4,000 or secure a sponsor booth with a sponsorship which includes your booth cost!

Only AICPA delivers a national audience of top-level CPA professionals! At this and all AICPA Conferences, you benefit from a quality audience and exciting exhibit hall programs that create maximum selling time.

When you exhibit, you get 10 x 10 ft booth that comes with a carpeted floor, draped table with two chairs and wastebasket. You also earn these sales-building benefits:

- 2 main-conference passes for you and your staff that qualify for CPE credit when desired. (For additional conference passes, contact Rachel Justice, rachel.justice@aicpa-cima.com.)
- Unlimited expo-only passes at \$500 each (no admission to sessions).
- Pre- and post-conference attendee lists with USPS mailing addresses.
- Inclusion in the mobile app exhibitor directory with 50-word company description.
- Special attendee discount code for your customers and prospects.

And don't forget the advantages of sponsorship. SPONSORSHIPS position your company as a leader at a time when key decision-makers are eager to learn, and ready to help their firm or clients grow. So when you think about investing in face-to-face interaction at an AICPA Conference, consider the impact that a sponsorship will make on key customers and prospects.

Becoming a sponsor is easy. We offer sponsorships at many price-points, and all come with premium exhibit space and all exhibitor benefits! With any sponsorship you choose, you receive brand-building exposure with your corporate logo on signage, on big screens in general sessions, in the conference mobile app and more.

“The attendees are very approachable and are interested in learning about what we do. It is a great opportunity to interact with attendees to find out what is on their minds. It is a great match!”

Norma McCutcheon, COO, ERISApedia.com

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Consultants and Leaders in:

- Payroll/Payment Systems
- Automation/Paperless
- Cloud Computing/Cloud Solutions
- Large Trustees
- Financial Services/Business Advisory
- Electronic Audit Software Providers
- ERISA attorneys
- Tax Automation
- TPAs
- Workflow
- Pricing Companies
- Qualified Plan Consultants
- Custodians/Service Providers
- Accounting and Auditing
- Valuation Companies
- Insurance Providers
- Tax Incentives/Cost Segregation
- Tax Prep Software
- Plan Administrative Firms
- Document Management
- Data Security
- Risk Strategies & Management
- Information Management
- Online Communication
- Plan Advisors
- Recordkeepers
- Software Providers of Form 5500
- Technology/IT Services
- Practice Management Software

Why exhibit?

- This is your Prime Target Market
- Showcase Products & Services
- Stand Out as a Leader
- Build Brand Awareness
- Network with New Clients
- Strengthen Relationships with Existing Customers
- Check Out Your Competition
- Reach True Decision-Makers
- Reach & Exceed Sales Goals
- Increase Market Share

**People like to do business
with people they've met face to face.**

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Executive level:

Platinum	Sponsor a networking item and a materials item, 10'x20' exhibit space, banner ad on mobile app, logo on cover of brochure, full page ad in conference program, prominent signage, six badges total.	\$25,000
Gold	Sponsor a networking reception, banner ad on mobile app, logo on cover of brochure, full page ad in conference program, prominent signage, five badges total.	\$20,000
Silver	Sponsor a networking item or materials item, banner ad on mobile app, full page ad in conference program, prominent signage, four badges total.	\$15,000
Bronze	Sponsor a networking break, banner ad on mobile app, full page ad in conference program, prominent signage, three badges total.	\$12,500

Technology:

Charging tower	Provides a memorable and genuinely appreciated service while gaining some extra face time while attendees' devices recharge. Prominent sponsor recognition.	\$12,000
WiFi/Power zone	Major signage, tent cards next to power strips, logo and sponsorship recognition on back of attendee badges (info section of the badge) and customized password (in some venues).	\$15,000
Exclusive mobile APP	Your logo on large-scale version of the mobile app located near your booth, rotating banner ad on app, logo on splash screen, recognition in mobile app invitations and promotions.	\$9,000

Sponsorships increase your ROI, drive traffic to your booth and build brand recognition in a competitive marketplace.

The following sponsorships were designed to stretch your marketing budget and help your business STAND OUT as an industry leader.

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Materials:

Tote bag	Your logo on tote bags given to all attendees, insert in tote bag.	\$13,000
Lanyards	Logo on lanyards worn by attendees during the conference.	\$10,000
Professional headshot	Offer attendees a chance to update their headshots while increasing traffic at your booth! Photo area is set up at specific location and attendees are required to come to your booth to pick up confirmation card in order to download their digital headshot.	\$8,500
Luggage check	Logo on luggage tags given to all attendees. Major signage at complimentary luggage check located by the conference area for attendees.	\$8,500
Notebook and pen	Sponsor supplied notebook and pen set with logo inserted in all attendee bags.	\$8,500

Networking:

Breakfast	Title recognition as Breakfast Sponsor; your company logo will be imprinted on napkins used at Breakfast; prominent signage promoting sponsorship in Breakfast area.	\$13,500
Luncheon	Customized menus with company logo, reserved table up to 10 guests, prominent signage acknowledging sponsorship.	\$12,000
Wine and cheese reception	Kick off the conference as the Wine & Cheese Welcome Reception Sponsor. This is a great opportunity to take the lead early as the exclusive sponsor of the pre-conference Reception. Major signage and logo on cocktail napkins included. Can also be customized to add wine and cheese pairings. Call for more details.	\$12,000
Entertainment	Every great party needs great entertainment and what better way to celebrate being in New Orleans than with great music. Be our exclusive entertainment sponsor and be prepared to introduce our entertainment for the evening. Everyone will be sure to thank you!	\$10,000

All sponsorships receive the following:

- A 10' x 10' exhibit space in a Premium Location (top of aisle, on a corner, near the entrance, near F&B stations, near bar).
- At least two (2) conference badges with CPE credit. (more badges offered depending on the Sponsorship.)

Branding advantages with all sponsorships:

- Company listing in the Mobile App Exhibitor Directory.
- Your company logo on the "Thank You" signage at the entrance to Exhibit Hall.
- Your company name/logo will be prominently displayed on signage promoting your Sponsorship.
- Company logo on PowerPoint slide recognizing you as Sponsor. Slide rotates with other sponsor slides during session breaks.
- Company name with link to company website on Conference website.
- Your company logo on the Conference Mobile App.
- Inclusion in conference marketing materials, e-blasts and social media, wherever possible.

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Networking:

Afternoon break	Located in expo hall, afternoon breaks provide high traffic and exposure. Title recognition with prominent signage and your company logo imprinted on napkins used during the break, specialty food item served at break. (2 available)	\$8,500
All-day coffee	All-day coffee service in expo hall; your exhibit booth will be placed adjacent to coffee station driving traffic to booth; your logo on coffee sleeves and prominent signage; title recognition as a sponsor on conference materials.	\$15,000
Recharge lounge	Offer attendees a place to relax and recharge their mobile devices. Your corporate logo will be displayed prominently within the Recharge Lounge.	\$12,500
Learning lab/tech demo	Sponsor a 25 minute Learning Lab or Tech Demo during a networking break in the learning pavillion. Major signage; session promoted in conference program. (4 Available)	\$8,000
Passport game sponsor	Be a part of the "Passport to Prizes" and ensure maximum traffic to your booth. Attendees will be provided passport instructions at registration and as a participant, will be required to visit your booth for a stamp to enter one of many drawings for your sponsor-provided prizes (\$100 min. value). 20 spaces available.	\$300 (plus sponsor-provided prize)
Custom cocktail	This is your chance to be the mixologist for our event. Work with the hotel chef to create a custom New Orleans cocktail that will be available for one night only!	\$10,000

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Preconference logistics information:

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

Name: _____

Title: _____

Company name: _____ Publicity name: _____

Address (no P.O. Boxes): _____

City: _____ State: _____ ZIP: _____

Country: _____

Phone: _____

Email: _____

Conference advertising (exhibitors and sponsors only):

On-site Conference Program: Inside Full Page: \$1,000 | **Conference Mobile App:** Mobile App Banner Ad: \$1,000

Space assignment/pricing: Locations will be assigned based on availability at the time the contract is received. Cost is \$4,000 for a 10' wide by 10' long booth space which includes carpet, draped table, and two chairs.

Early Bird price for returning vendors: Cost is \$3,700 (application must be received by November 1, 2019).

Booth preference: ____ 1st choice ____ 2nd choice ____ 3rd choice

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

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

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 (ext. 102).

Sponsorship: _____ **Price:** _____

Payment and cancellation policy: Space locations will be confirmed once application and full payment is received. Full payment must be received 30 days of the invoice date. **Applications received within 60 days of the conference will be invoiced immediately and must be paid immediately.** 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 exhibit application to: jerickson@morrismarketinginc.com or Fax 888.316.9536

If paying by check, make payable & send to: AICPA Conferences, Employee Benefit Plans Conference, P.O. Box 37048, Boone, IA 50037-0048

If paying by credit card, complete attached payment form & securely send to: jerickson@morrismarketinginc.com

2019 Exhibitor rules and 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 tabletop 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 within 30 days of the invoice date. All exhibits and sponsorships must be paid in full 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. (For additional conference passes, contact AICPA Group Sales, 919.402.4823.) Additional unlimited expo-only passes may be purchased at \$500 each (no admission to sessions);
- 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 mobile app;
- 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 setup 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 exhibitors 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 third party 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



c/o Morris Marketing Inc.
800.504.4749

2019 Credit Card Payment Authorization Form

Please sign and complete this form to authorize AICPA to make a one time debit to the credit card listed below.

By signing this form you have provided AICPA with permission to debit your account for the amount indicated on or after the indicated date. This is permission for a single transaction only, and does not provide authorization for any additional unrelated debits or credits to your account.

Please complete the information below:

I _____ authorize AICPA to charge my credit card
(full name)

account indicated below for _____ on or after _____. This payment is for
(amount) (date)

Exhibition/Sponsorship at _____
(Specific name of AICPA Conference & Conference Dates)

Company Name _____

Billing Address _____ Phone# _____

City, State, Zip _____ Email _____

Account Type: Visa MasterCard AMEX Discover

Cardholder Name _____

Account Number _____

Expiration Date _____

CVV2 (3 digit number on back of Visa/MC, 4 digits on front of AMEX) _____

SIGNATURE _____ DATE _____

I authorize the above named business to charge the credit card indicated in this authorization form according to the terms outlined above. This payment authorization is for the goods/services described above, for the amount indicated above only, and is valid for one time use only. I certify that I am an authorized user of this credit card and that I will not dispute the payment with my credit card company; so long as the transaction corresponds to the terms indicated in this form.

Please scan and securely email to: jerickson@morrismarketinginc.com

Thank you!
Gerry Charbonneau, Exhibit & Sponsorship Sales