



SOUTHERN FEDERAL
TAX INSTITUTE

2023
Sponsorship and Exhibitor
Prospectus

October 30-November 3, 2023
Grand Hyatt Atlanta in Buckhead*

*Also available via livestream

Platinum Sponsor

\$15,000

Benefits Include:

- Your company name/logo on the front of the marketing brochure mailed to potential registrants (40,000+)
- Your company announced as Co-Host (with other Platinum Sponsors) of the Monday and Thursday Cocktail Receptions
- Right of first refusal for 2024 Institute
- Representative from your firm to present brief speech to entire audience prior to cocktail receptions
- Opportunity to show marketing video during attendee arrival
- Most prominent sponsor name/logo placement on Institute materials and signage
- Your company name/logo on the big screen in meeting rooms during breaks (and via livestream)
- Two representatives of your firm/company to attend daily VIP lunches with Trustees/Speakers of the Institute
- Two representatives of your firm/company to attend the Wednesday Evening Speaker/Trustee dinner held at either private country club or upscale restaurant
- Your company name/logo with a link to your website in our blast emails and social media posts
- The attention of over 600 attendees at the Institute
- Daily announcements from the podium announcing your firm as Platinum Sponsor
- Opportunity to include a flyer in the attendee registration envelope
- Exhibitor fee discount should you also wish to exhibit
- Sponsor ribbons on your name badge for ease of recognition
- Your company logo on our website (over 5,000 visits each year) with link to your website
- An opportunity to meet and greet registrants and distribute informational materials at the Institute from Monday through Friday at breakfast
- Access to the pre- and post-Institute attendee mailing list with emails, two weeks prior to Institute, for use in notifying attendees of your presence at the event and one-time follow up one week after the Institute

Registration Discounts:

Sponsor will receive a 30% discount on all employee registrations to attend SFTI

2

Direct inquiries about sponsorship opportunities to:
Mallory Decker mdecker@brammgmt.com / 804 514-9182 (cell)
2107 N. Decatur Road, PMB 521 • Decatur, GA 30033

Mid-Day Presentation Sponsor

**\$8,750
(Mon-Wed)
or
\$9,500
(Thur)**

Benefits include:

- Opportunity to show marketing video during attendee arrival
- As a Mid-Day Presentation Sponsor you will have the opportunity to provide a presentation that is both timely and educational (topic subject to SFTI approval)
- Mid-Day Presentation (title, presenter and your firm as sponsor) listed on Institute schedule mailed to potential registrants and posted on SFTI website
- Free lunches will be provided to all Institute attendees who register for Mid-Day Presentation
- Distribution of firm/company marketing materials on day of presentation
- Your company name/logo placement on Institute signs placed on easel throughout meeting area on day of presentation
- Your company name/logo streaming across big screen in meeting rooms before and after mid-day presentation (and via livestream)
- Your company name/logo included in marketing brochure mailed to potential registrants (40,000+)
- Two representatives of your firm/company to attend the Wednesday Evening Speaker/Trustee dinner held at either private country club or upscale restaurant
- Company name/logo with a link to your website in our blast emails and social media posts
- Announcement from the podium on day of mid-day presentation stating your firm/company as sponsor of the mid-day presentation
- Exhibitor fee discount should you also wish to exhibit
- Sponsor ribbons on your badge for ease of recognition
- Your company written up on our website (over 5,000 visits each year)
- Your firm/ Access to the pre- and post-Institute attendee mailing list with emails, two weeks prior to Institute, for use in notifying attendees of your presence at the event and one-time follow up one week after the Institute

Registration Discounts:

- Sponsor will receive a 30% discount on all employee registrations to attend SFTI

Speaker/Trustee Dinner Sponsor

\$8,500

Benefits include:

- Named sponsor of the Wednesday Evening Speaker/ Trustee dinner held at either private country club or upscale restaurant
- Opportunity to make welcoming remarks at Speaker/Trustee Dinner
- Announcement from podium that your firm/company is the sponsor of the Speaker/Trustees Dinner on day of dinner
- Your company name/logo included in marketing brochure mailed to potential registrants (40,000+)
- Four representatives of your firm/company to attend to the dinner
- Your company name/logo with a link to your website in our blast emails and social media posts
- Opportunity to include a flyer in the attendee registration envelope
- Exhibitor fee discount should you also wish to exhibit
- Sponsor ribbons on your badge for ease of recognition
- Your company written up on our website (over 5,000 visits each year)
- Access to the pre- and post-Institute attendee mailing list with emails, two weeks prior to Institute, for use in notifying attendees of your presence at the event and one-time follow up one week after the Institute

Registration Discounts:

- Sponsor will receive a 30% discount on all employee registrations to attend SFTI

Gold (Full Day) Sponsor

\$5,500

Benefits include:

- Your company announced as sponsor for entire day (excluding Mid-day Presentation).
- Distribution of company marketing materials on day of sponsorship
- Company name/logo placement on Institute signs placed on easels throughout meeting area on day of Sponsorship
- Company name/logo streaming across big screen in meeting rooms during breaks on day of sponsorship (and via livestream)
- Your company name/logo included in marketing brochure mailed to potential registrants (40,000+)
- Two representatives of your firm/company to attend that day's VIP lunch with Trustees/Speakers of the Institute
- Two representatives of your firm/company to attend to the Wednesday Evening Speaker/Trustee dinner held at either private country club or upscale restaurant
- Your company name/logo with a link to your website in our blast emails and social media posts
- Opportunity to include a flyer in the attendee registration envelope
- Exhibitor fee discount should you also wish to exhibit
- Sponsor ribbons on your badge for ease of recognition
- Your company written up on our website (over 5,000 visits each year)
- Access to the pre- and post-Institute attendee mailing list with emails, two weeks prior to Institute, for use in notifying attendees of your presence at the event and one-time follow up one week after the Institute

Registration Discounts:

- Sponsor will receive a 30% discount on all employee registrations to attend SFTI

Partner Sponsor

\$2,500

Benefits include:

- Company name/logo placement on Institute signs placed on easel throughout meeting area
- Your company name/logo included in marketing brochure mailed to potential registrants (40,000+)
- Two representatives of your firm/company to the Wednesday Evening Speaker/Trustee dinner held at either private country club or upscale restaurant
- Your company name/logo with a link to your website in our blast emails
- Sponsor ribbons on your badge for ease of recognition
- Your company written up on our website (over 5,000 visits each year)

Registration Discounts:

- Sponsor will receive a 30% discount on all employee registrations to attend SFTI

EXHIBITOR

\$1,900/\$1,400

DATE	October 30 - November 3, 2023 Exhibit area open - October 30 - November 3, 2023
LOCATION	Grand Hyatt Atlanta in Buckhead 3300 Peachtree Road, NE, Atlanta, GA 30305, Ph: 800-237-1234
ATTENDEES	Tax Attorneys, CPAs, Trust Officers, Estate Planners, Financial Planners, CLUs and ChFCs.
COST	The \$1,400.00 investment includes an 8 ft. x 6 ft. area with one draped 6ft. table, and two chairs (\$1,900.00 for one and one-half spaces). This fee also includes attendance at the Monday, Wednesday and Thursday evening cocktail receptions, continental breakfast each morning, two beverage/snack breaks each day and box lunches. <i>Also included is a 30% reduction in the registration fee for representatives of exhibitors who wish to attend the educational sessions of the Institute (this fee includes the materials and CE credits).</i>
SHIPPING	Display materials should be shipped to your on-site contact and Mallory Decker/SFTI , Grand Hyatt Atlanta Hotel, 3300 Peachtree Road NE, Atlanta, GA 30305. Mark shipment for: Southern Federal Tax Institute, the name of your firm and your on-site contact. Packages should not arrive more than 3 days before the meeting. There will be a charge of \$3.50 per box for moving and storage (number boxes _ of _).
SET-UP	Exhibit area will be available for set-up on Sunday (after 3pm), or Monday/Tuesday after 5:30 p.m. This flexible set-up arrangement and tear-down arrangement (see below) allows you to set-up as early in the week as you wish and to tear-down when you wish, but all set-up and tear-down must be in the evening after all SFTI activities have concluded. If using a booth, please be sure to include size on the application.
BREAKDOWN	Exhibits conclude at 1:00pm on Friday, November 3, 2023. If you wish to break-down your exhibit after Monday, Tuesday or Thursday at 5:30pm, please note this on the Exhibit Application Form.
HOTEL	Hotel rooms at discounted SFTI rates are available. Please use the hotel reservation form in the meeting program or go to www.sfti.org . Be sure to tell them you are with the SFTI group.
ELECTRICITY	If you need electricity, please fill in the information on the Exhibit Application Form. The Grand Hyatt will work directly with you regarding electricity and phone needs. For questions regarding this, contact Megan Norris at 404-364-3912.

EXHIBITOR APPLICATION

Size: _____ 8' x 6' one space - \$1,400.00 _____ Space & one half - \$1,900.00

*Special Offer: Exhibitors may register for the Institute at **30% off the registration fee.***

COMPANY _____

ADDRESS _____

CONTACT PERSON _____

TITLE _____

TELEPHONE (____) _____ CELL (____) _____

E-MAIL _____

Indicate if you will be bringing a booth (include size), using the table furnished or both.

Booth(size) _____ Table _____ Both _____ Do you need an easel? Yes___ No___

Electricity: Yes__ No__ *Handled directly by the Hyatt (404 364 3912- Megan Norris) at Exhibitor's expense.*

Set-Up Date: _____ **Tear Down Date:** _____

Company Logo: Please send a high resolution file (EPS and JPEG files REQUIRED) of your company logo to: mdecker@brammgmt.com so we may include this on the SFTI website and signage.

Badges: Name badges will be provided for persons working in your booth. Email these names to info@sfti.org by **October 2, 2023.**

Exhibitor Release: Exhibitor assumes entire responsibility and hereby agrees to protect, indemnify, defend and save the Southern Federal Tax Institute, Inc., The Grand Hyatt, Hyatt Hotels Corporation and its employees and agents harmless against all claims, losses and damages to persons or property, governmental charges or fines and attorney fees arising out of or caused by Exhibitor's installation, removal, maintenance, occupancy or use of the exhibition premises or a part thereof, excluding any such liability caused by the sole negligence of The Southern Federal Tax Institute, Inc., The Grand Hyatt, Hyatt Hotels Corporation, its employees and agents.

In addition, Exhibitor acknowledges that the Southern Federal Tax Institute, Inc., The Grand Hyatt, Hyatt Hotels Corporation do not maintain insurance covering the Exhibitor's property and that it is the sole responsibility of Exhibitor to obtain business interruption and property damage insurance covering such losses by Exhibitor.

Please make checks payable to Southern Federal Tax Institute. Enclosed check # _____

Mail to: Southern Federal Tax Institute, 2107 North Decatur Rd., PMB 521, Decatur, GA 30033

OR AMEX, MC, VISA card # _____ **Exp. Date** _____

Name on Card _____ **Security Code** _____

Billing Address _____
(Street address) (City/State/Zip)

Authorized Signature: _____

RETURN TO: Mallery Decker - mdecker@brammgmt.com

RULES AND REGULATIONS

Act of God •

In the case of cancellation of the Institute, or unavailability of the exhibit hall, due to Acts of God, war, threats or acts of terrorism, governmental authority, fire, strike, labor disputes, or any other cause beyond the control of the SFTI, this agreement shall terminate, and SFTI shall not be responsible for any damages or expenses incurred by the sponsor or exhibitor in connection therewith.

Assignment of Exhibit Space •

Assignment of space will be determined by the SFTI. SFTI has the right to rearrange the floorplan in the event of conflicts.

Cancellation Policy •

All sponsor/exhibitor commitments are non-refundable.*

*Sponsors will receive a 50% refund if in-person Institute is cancelled due to a pandemic. Institute will be held virtually in lieu of in-person.

*Exhibitors will receive a 100% refund if in-person Institute is cancelled due to a pandemic.

Character of Exhibits •

No exhibit shall be permitted to interfere with another exhibit, impede access to another exhibit, use the space of another exhibit, or interfere with the free use of the aisle in front of any exhibit. All exhibit materials, including decorations, exhibit display, and audiovisual equipment must conform to fire regulations and electrical codes of the hotel. Exhibitors with audible electric devices, videos and other exhibits or devices, which might prove objectionable to other exhibitors, may be required to accept booth assignments that diminish reasonable objections.

Compliance •

These instructions and regulations have been formulated for the best interest of the sponsor / exhibitor. Failure to comply may result in removal of an exhibit or cancellation of a sponsorship with no refund of fees to the sponsor/exhibitor.

Dismantling •

No booth may be dismantled until the time noted within the final sponsor/exhibitor kit. Any exhibitor that begins dismantling before this time may revoke their right to exhibit at any future SFTI.

Distribution of Printed Material •

Except from within rented space, exhibitors and sponsors shall not distribute printed material, samples, souvenirs, and the like. Distribution of materials elsewhere in the exhibit area, general or breakout session space, in the hotel or on hotel property is not permitted.

Insurance & Liability •

Sponsor/exhibitor assumes entire responsibility and hereby agrees to protect, indemnify, defend, and save SFTI and its employees and board of trustees harmless against all claims, losses and damages to persons or property, governmental charges or fines and attorney's fees arising out of or caused by Exhibitor's transportation, installation, removal, maintenance, occupancy, display or use of exhibits, or of the exhibition premises or a part thereof, excluding any such liability caused by the sole negligence of SFTI and its employees and board of trustees.

Mailing List •

Electronic list of registered attendees (including only physical addresses and e-mail addresses) will be provided to Sponsors entitled to such list two weeks prior to the start of the Institute and within one week of the conclusion of the Institute. The electronic list is provided for the sole purpose of contacting attendees of the Institute to promote Sponsor attendance at the Institute (pre-Institute

contact) and to thank attendees for their attendance of the Institute (post-Institute contact). The list is provided for one-time use (includes one pre and one post-Institute contact) and may not be duplicated or entered into a database. Please see below for a full copy of the Mailing List Usage Policy.

Multi-Year Commitments •

Sponsors/Exhibitors that opt into a multi-year commitment may take advantage of a 15% discount on both years of support. Full payment of the 2023 sponsorship and a deposit of 25% of the 2024 sponsorship is required upon commitment. The remainder payment is due on or before June 5, 2023.

Property Damage •

Sponsors/Exhibitors are responsible for damage to property. No signs or other articles shall be posted, nailed, or otherwise attached to any of the pillars, walls, doors, floors, etc., in such a manner as to deface or destroy.

Shipping Instructions, AV, Electricity & Telephone Service •

Information regarding these items will be available to sponsors / exhibitors prior to the Institute and will be distributed via email.

Sponsors who are Exhibitors •

The cost of any Exhibitor, who is also a sponsor (minimum \$5,500 sponsorship), is reduced by \$500.00 (from \$1,400 – for a single table - to \$900 or from \$1,900 – for 1.5 tables - to \$1,400).

MAILING LIST USAGE POLICY

All sponsors entitled to mailing list usage will receive one pre and one post-Institute mailing list of attendee addresses (physical address and e-mail address) for use in promoting their attendance at the annual Institute (pre-Institute contact) and to thank the attendees for their attendance of the Institute (post-Institute contact). By accepting delivery of each list, sponsor agrees to the terms outlined below.

- Attendee names and addresses may be used only for mailing purposes (physical or electronic delivery only) and may not be used for telephone or personal contact.
- SFTI names or logos may not be used on any material mailed by user. The sponsor may reference their attendance at the “57th Annual Southern Federal Tax Institute”.
- Sponsor may use attendee names and addresses for an approved use one time only (one pre-Institute contact and one post-Institute contact). Sponsor will not copy, replace, or duplicate the names and addresses or any portion thereof or extract or retain any information there from. Sponsor will not at any time permit any attendee names and addresses to pass into the hands of any other person, association, organization, or company.
- Any post-Institute mailing must take place within sixty (60) days of receipt of the list.
- Sponsor will hold SFTI harmless against any damages or claim of damage, costs and reasonable attorney fees, arising out of any actual or alleged impropriety or illegality of mailed matter or infringement of trademark, trade name, or copyright belonging to others.
- Sponsor agrees to forward within thirty (30) days following receipt, any letters or other documents (or copies thereof) containing complaints by attendees regarding the sponsor’s mailing, the matter transmitted therein, or the offered product or service.
- Sponsor is solely responsible for determining that the information provided is sufficiently accurate for the sponsor’s purposes.