



**Virtual Office News  
Technology Tools for Today ®  
T3 Conference**

**2017**

# **SPONSORSHIP OPPORTUNITIES**

**February 14-17, 2017  
Hyatt Regency Orange County, Garden Grove, CA**



Dear Friends:

We would like to extend to you a special invitation to join us for our **2017 Virtual Office News Technology Tools for Today® T3 Conference**, to be held on February 14-17, 2017 at the fabulous Hyatt Regency Orange County, Garden Grove, CA.

If you are new to the Technology Tools for Today® Conference, you will learn what our existing sponsors already know: the benefits of sponsoring are three-fold. First, T3 gives you access to the highest level of independent financial advisors, all of whom come to T3 to make purchase decisions in line with their strategic technology visions, as influenced by you, the sponsor. Second -- and not so obvious to new sponsors -- is the collegiality in the exhibit hall that lends itself to collaboration and deal-making between and amongst T3 sponsors. Many sponsors tell us they benefit as much from the interaction with potential technology partners as they do the advisor attendees. And third, T3 gains more and more press coverage by major news outlets every year, which benefits our sponsors by publicizing their latest expansion efforts and new product/service announcements."

Technology expert **Joel Bruckenstein** will co-chair the conference. If you provide technology/practice management support to the financial advisor community, this is the one event of the year that specifically targets and connects you to those advisors who most need your services.

For 2017, we will be offering four levels of sponsorship- Platinum plus, Platinum, Gold and Silver. Each level's benefits are described in the enclosed sponsorship forms. We are offering your firm the option to garner further recognition with additional sponsorship opportunities listed in the enclosed sponsor forms.

Find out why technology leaders such as: **Fidelity Investments, TD Ameritrade, Salesforce, AppCrown**, along with: **Advent**, have chosen to sponsor the **Technology Tools for Today® T3 Conference**. This event will be a great success, and we sincerely hope to welcome your firm to our family of sponsors.

**Please send in your registration form with the required minimum deposit ASAP to reserve your booth now! The 2016 show was a complete sellout, so we only have a limited amount of time for returning sponsors to pre-reserve their booth space before we accept applications from new sponsors. Booth placement will be determined by sponsorship level and the order in which deposits are received.**

Sincerely,

Joel Bruckenstein, Conference Co-Chair  
**2017 Virtual Office News Technology Tools for Today® T3 Conference**



# SPONSORSHIP APPLICATION/CONTRACT TO EXHIBIT

2017 Virtual Office News  
Technology Tools for Today® T3 Conference  
February 14-17, 2017  
Hyatt Regency Orange County, Garden Grove, CA

Organization (exactly as it should appear in program) \_\_\_\_\_

Mailing Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Phone Number \_\_\_\_\_

Web Address \_\_\_\_\_ E-mail \_\_\_\_\_

MAIN SPONSOR CONTACT NAME (exhibits/registration): \_\_\_\_\_

PHONE NUMBER: \_\_\_\_\_ E-mail \_\_\_\_\_

SECONDARY SPONSOR CONTACT NAME (session information) (if applicable): \_\_\_\_\_

PHONE NUMBER: \_\_\_\_\_ E-mail \_\_\_\_\_

(Choose one of the following)

**PLATINUM PLUS** **PLATINUM** **GOLD** **SILVER**

**Please see attached page for pricing and benefits!**

Booth Selection (Silver / Gold / Platinum/Platinum PLUS) \_\_\_\_\_

Cost of Booth - (Silver=\$6,500, Gold = \$12,500, Platinum = \$17,500) \$ \_\_\_\_\_  
Platinum Plus=\$25,000

**Additional Sponsorship Events or Items: Please indicate you interest below. Price will be confirmed upon acceptance.**

See attached form for all opportunities: (Place sponsorship information below):  
\_\_\_\_\_ \$    TBD     
\_\_\_\_\_ \$    TBD   

Other items available please call for details 703-549-9500  
**Total Sponsorship Fee Due\*** \$ \_\_\_\_\_

Special Instructions/Comments:  
\_\_\_\_\_

Return to: T3 Conference; c/o AIM Meetings; 212 S. Henry Street; Alexandria, VA 22314  
Questions: 703-549-9500  
Fax: 703-549-9074  
Email: [pgalanty@aimmeetings.com](mailto:pgalanty@aimmeetings.com); [wgalanty@aimmeetings.com](mailto:wgalanty@aimmeetings.com)



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### \* Payment Schedule-

A non-refundable deposit of \$1,000 is due at the time application is submitted. The remainder of your sponsorship fee balance will be charged to your credit card, or you will be invoiced if paying by check, in equal increments on June 30, September 30 and December 30. (If your application is received after June 30th, then increments will be adjusted accordingly. If your application is submitted after Dec. 30th, total fee will be charged at time of submission).

Payment Method: (Select One)

Visa  MasterCard  American Express  Check (made payable to Virtual Office News, LLC)

If paying by check, you will be invoiced according to payment schedule

Pay Now – Non-Refundable Deposit Check enclosed for \$\_\_\_\_\_

Please charge my credit card according to the Payment Schedule set forth in this agreement.

Name on Card: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

Card Number # \_\_\_\_\_ Security Code: \_\_\_\_\_

Card Billing Address: \_\_\_\_\_

Card Holder Signature: \_\_\_\_\_

Send to: AIM Meetings & Events, Inc. Fax: 703-549-9074  
212 South Henry Street, Suite 200, Alexandria VA 22314 Questions: 703-549-9500

**Cancellation Policy: Deposits are non-refundable.** All cancellations must be made in writing and will be subjected to a \$500 cancellation fee. If cancellation occurs after October 30, 2016 and before December 1, 2016, 50% of the total sponsoring fee agreed upon in sponsor's Application/Contract to Exhibit will be due and payable with written cancellation. If cancellation occurs on or after December 1, 2016, 100% of the total sponsoring fee agreed upon in sponsor's Application/Contract to Exhibit will be due and payable with written cancellation. The conference reserves the right to cancel sponsor exhibits if strikes, natural disasters, disruption in the transportation network or other events make it impossible or invasive to hold exhibits. If cancellation occurs under this provision, exhibit fees will be refunded to the extent funded by cancellation insurance.

**AGREEMENT-** The undersigned on behalf of the applicant company, its employees, agents, and contractors, agrees to comply with rules and regulations set forth on the "Exhibitor Rules and Regulations." Exhibitor acknowledges receipt of this document. Once accepted, this completed form is considered binding on both exhibitor and the conference.

\_\_\_\_\_  
**Signature- Authorized representative of Sponsor**                      **Company**                      **Date**

<b>*For Internal Office Use Only:</b>				
<b>Payment</b>	<b>Amount</b>	<b>Date Paid</b>	<b>Method</b>	<b>Notes</b>
Non-refundable Deposit	\$ 1,000	_____	_____	_____
June 30th, 2016	\$ _____	_____	_____	_____
September 30th, 2016	\$ _____	_____	_____	_____
December 30th, 2016	\$ _____	_____	_____	_____
_____				
<b>Signature- Authorized representative of T3® Conference</b>			<b>Date</b>	<b>Booth Number</b>

# SPONSORSHIP OPPORTUNITIES

## **PLATINUM PLUS** **Level I - \$25,000**

### **Benefits Include:**

- Double Booth (20 foot length) in Exhibit Hall (First to choose location)
- Conference General Session speaking opportunity
- Inclusion in Tech Lab Sessions
- Registration for up to seven representatives
- Opportunity to insert approved promotional items in conference bags
- Coffee break co-sponsor in the exhibit hall
- Company logo on conference signage
- Prominent listing on conference website
- The opportunity to submit a white paper to the T3 knowledge bank

## **PLATINUM** **Level II - \$17,500**

### **Benefits Include:**

- Double Booth (20 foot length) in Exhibit Hall
- “Super Session” speaking opportunity
- Inclusion in Tech Lab Sessions
- Registration for up to five representatives
- Opportunity to insert approved promotional items in conference bags
- Coffee break co-sponsor in the exhibit hall
- Prominent link on conference website
- Company logo on all conference signs

**GOLD**  
**Level III - \$12,500**

**Benefits Include:**

- Double Booth (20 foot length) in Exhibit Hall
- Breakout Session speaking opportunity
- Registration for three representatives
- Opportunity to insert approved promotional item in conference bags
- Coffee break co-sponsor in the exhibit hall
- Link on conference website

**SILVER**  
**Level IV - \$6,500**

**Benefits Include:**

- Booth in Exhibit Hall
- Flash Session speaking opportunity
- Registration for two representatives
- Recognition on brochure and website

**SPONSORSHIP PACKAGE ADD-ONS:**

**Please check interest:**

- |                                     |       |                                  |       |
|-------------------------------------|-------|----------------------------------|-------|
| ➤ Hotel Key Cards                   | _____ | ➤ Pocket Agenda                  | _____ |
| ➤ Lanyards                          | _____ | ➤ Elevator Wraps                 | _____ |
| ➤ Badge Holders                     | _____ | ➤ Wi-Fi Hot Spot                 | _____ |
| ➤ Daily Newspaper                   | _____ | ➤ Tote Bags                      | _____ |
| ➤ Conference App Sponsor            | _____ | ➤ Sponsor a lunch                | _____ |
| ➤ Cell Phone/I Pad Charging station | _____ | ➤ Sponsor a breakfast            | _____ |
|                                     |       | ➤ Sponsor the cocktail reception | _____ |

# EXHIBITOR RULES AND REGULATIONS

## 1. Contract for Space

The receipt by the conference of your signed Application/Contract to Exhibit accompanied by payment of the initial required deposit will constitute a reservation for booth space. All approved applications will be accepted on a first come/first serve basis. Once allotted space has been filled, a waiting list will be maintained with space assigned if it becomes available or in the event of a cancellation. The conference reserves the right to cancel all or part of the conference and shall be obligated only to return that portion of prepaid exhibit fees not expended or committed.

## 2. Exhibitors

All exhibitors must meet the following criteria:

- A. Uphold the highest standards and professional image of Professional Financial Planners
- B. Exhibit only products or services which directly relate to technology solutions for Professional Financial Planners.
- C. Agree not to sell any products or services.
- D. Each sponsor who desires to sell their product/service on the show floor must register and obtain any local or state sales certificate and comply with all the local regulations regarding the sale of such material. T3 is not responsible for obtaining any certificates on behalf of any sponsor.

## 3. Exhibit Regulations

- A. No private functions may take place during the conference without prior consent of conference management.
- B. Set up displays in accordance with the items specified by the conference. Material displayed must be educational in nature. All exhibits must be confined to the booth assigned. Storage of all literature and catalogs must be on or under the tables provided.
- C. No audio presentations are permitted.
- D. Occupy the booth space rented. At least one representative must be at the booth during all published exhibit times.
- E. You may distribute give-always of your choice and have private drawings for door prizes at your booth.
- F. Use the official on-site service contractor for drayage, rigging, electrical, plumbing, vacuuming, custom cleaning and all booth furnishings including audio/visual equipment and labor necessary to complete stated services. The service contractor will be informed of all accepted exhibitor applications. Exhibitors assume all responsibility for set-up, removal, maintenance and use of the exhibit area, including fees incurred as a result of such use. Security will only be provided overnight only.
- G. Agree to abide by all laws, ordinances and regulations. Exhibitors shall not engage in illegal activities.
- H. The conference reserves the right to limit or change categories of products which may be exhibited or to prohibit any exhibit which it determines in its discretion may diminish the goodwill of the conference. If an exhibit is prohibited for these reasons the conference may refund exhibit fees.

## 4. Assignment

Exhibitors are prohibited from transferring or assigning their designated booth space.

## 5. Liability

- A. Exhibitor agrees to assume all risks of loss, injury, theft or damage of any kind to any exhibit or component thereof, and to assume all liability for damage to property, person or persons arising from accidental or other causes incidental to operations of exhibit and hereby releases the conference, attendees, representatives, and employees of Hilton Anatole Hotel from any and all claims of injury, loss or damage.
- B. The conference expressly disclaims all liability, expressed or implied, for the truth or legality of the content of any exhibit or material distributed.

## 6. Enforcement

The conference reserves the right to refuse or revoke any person or company from the exhibited area. And the conference may amend, add or delete from these resolutions as it deems necessary and such shall be fully binding on exhibitors.

## 7. No Use of Name

Exhibitor acknowledges that the conference is the sole owner of its name and marks in any advertising or other communication. Exhibitor may not utilize the conference verification/acceptance process in any ways to state or imply an endorsement of its products or services by the conference. Exhibitor agrees to indemnify the conference from any loss or damages arising from violation of this rule or from any communication which states or implies endorsement or the exhibitor or its products or services by the conference.

## 8. Sponsor Information

Sponsors agree to have their public information posted on the T3 app. Sponsors will not have the ability to approve this Information since it will be gathered from information on their website. Sponsors who agree to sponsor additional logoed Items, will provide T3 with their logo and agree that it be used appropriately.

## 9. Impossibility

The conference reserves the right to cancel the exhibits if strikes, natural disasters, disruption in the transportation network or other events make it impossible or inadvisable to hold events. If cancellation occurs under this provision, exhibit fees will be returned to the extent funded by the exhibitor's insurance.

Signature \_\_\_\_\_

Date \_\_\_\_\_