



**EXPANDING YOUR CIRCLE OF INFLUENCE**

**THE EXIT PLANNING  
SUMMIT**



Bringing together the Top CEPAs  
from Across the Globe

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*September 23-25, 2019  
St. Anthony Hotel, San Antonio, Texas*

**2019 SPONSORING PARTNER  
& MEDIA KIT**

The Seventh Annual

# EXCELLENCE IN EXIT PLANNING AWARDS

**Title Sponsor**

**\$6,000**

## EXCELLENCE AWARDS PARTNER

*Included in your Excellence in Exit Planning Awards Luncheon sponsoring partnership:*

- 30 min main stage session before awards reveal
- Company name & logo branded on awards and banner, signage throughout the event
- Company name & logo used in all marketing promotion activities, media, and press releases
- Branding in all Summit Materials and on EPI website
- Full page ad in Summit Program
- Company name & logo displayed during breaks
- 2 Summit Registrations
- Full attendee roster with contact information
- One Introduction Webinar prior to event
- Two dedicated articles in the EPI Weekly Update

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The 2019 Excellence in Exit Planning Awards will be presented during a special hosted luncheon on Tuesday, September 26, 2019.

*Quantity: 1 Sponsorship available*



Exit  
Planning  
Institute™

## Let's Catch Someone Doing Something Right

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The Excellence in Exit Planning Awards is hosted by the Exit Planning Institute annually and honors the Exit Planner of the Year as well as recognizes two EPI members through a Leadership Award demonstrating their thought leadership within the organization and a Member of the Year Award honoring their outstanding dedication and service to the organization.

The Exit Planner of the Year is awarded to a professional advisor who demonstrates their thought leadership within the profession, who have helped clients happily transition by successfully aligning their business, personal and financial goals and who have demonstrated they have lead and worked collaboratively on exit planning advisory teams with other professional advisors.

# ADDITIONAL SPONSORING PARTNER PACKAGES

## Speaking Exhibitor \$2,500

- Session presenter/panel during breakouts
- One 6' Table in Solutions Marketplace with Breaks
- Company name & logo used in all marketing promotion activities, media, and press releases
- Branding in all Summit Materials and on EPI website
- Marketing Material Insert in Welcome Packet

- Half-page ad in Summit Program
- Company name & logo displayed during breaks
- 2 Summit Registrations
- Full attendee roster with contact information
- 30-Minute Introduction Webinar prior to event

*Quantity: 3 Sponsorship available*

## "Giveback" Reception \$3,000

- Branded as host of Charity Reception
- Company name & logo used in all marketing promotion activities, media, and press releases
- Signage throughout the event
- Branding in all Summit Materials and on EPI website
- Marketing Material Insert in Welcome Packet

- Half-page ad in Summit Program
- One 6' Table in Solutions Marketplace with Breaks
- 2 Summit Registrations
- Full attendee roster with contact information
- 30-Minute Introduction Webinar prior to event

*\*\*Net proceeds will be donated to a local charity association on behalf of Sponsor Partner*

*Quantity: 1 Sponsorship available*

## Breakfast Session \$3,000

- Dedicated Main Stage Speaking Slot: Morning General Session
- One 6' Table in Solutions Marketplace with Breaks
- Company name & logo used in all marketing promotion activities, media, and press releases
- Branding in all Summit Materials and on EPI website

- Half-page ad in Summit Program
- Company name & logo displayed during breaks
- 2 Summit Registrations
- Full attendee roster with contact information
- 30-Minute Introduction Webinar prior to event

*Quantity: 2 Sponsorship available*

## Lunch Panel Discussion \$2,500

- Dedicated Main Stage Panel Slot: Sponsored Luncheon Session
- One 6' Table in Solutions Marketplace with Breaks
- Company name & logo used in all marketing promotion activities, media, and press releases
- Branding in all Summit Materials and on EPI website
- Marketing Material Insert in Welcome Packet

- Half-page ad in Summit Program
- Company name & logo displayed during breaks
- 2 Summit Registrations
- Full attendee roster with contact information
- 30-Minute Introduction Webinar prior to event

*Quantity: 3 Sponsorship available*

## General Exhibitor \$2,000

- One 6' Table in Solutions Marketplace with Breaks
- Company name & logo used in all marketing promotion activities, media, and press releases
- Branding in all Summit Materials and on EPI website
- Half-page ad in Summit Program

- Marketing Material Insert in Welcome Packet
- Company name & logo displayed during breaks
- 1 Summit Registration
- Full attendee roster with contact information

*Quantity: 9 Sponsorship available*



# 2019 Exit Planning Summit SPONSORING PARTNER & MEDIA KIT

## REGISTER TO SPONSOR

Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Organization: \_\_\_\_\_  
Billing Address: \_\_\_\_\_  
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City/ST/ZIP: \_\_\_\_\_  
Telephone: \_\_\_\_\_  
Fax: \_\_\_\_\_  
Email: \_\_\_\_\_  
Credit Card Number: \_\_\_\_\_  
Expiration Date: \_\_\_\_\_  
Name on Card: \_\_\_\_\_  
Signature: \_\_\_\_\_

Please indicate your preferred partnership selection:

Type	Cost
<input type="checkbox"/> Title Sponsor	\$6,000
<input type="checkbox"/> Speaking Exhibitor	\$2,500
<input type="checkbox"/> "Giveback" Reception	\$3,000
<input type="checkbox"/> Breakfast Session	\$3,000
<input type="checkbox"/> Lunch Panel Discussion	\$2,500
<input type="checkbox"/> General Exhibitor	\$2,000
<input type="checkbox"/> Opening Happy Hour Sponsor	\$1,500
<input type="checkbox"/> Full Page Ad	\$800
<input type="checkbox"/> Half-Page Ad	\$650
<input type="checkbox"/> Quarter Page Ad	\$500

NOTE: Exit Planning Summit marketing launches on January 30.

Please email to Joshua Koza, Client Experience Manager  
at [JKoza@Exit-Planning-Institute.org](mailto:JKoza@Exit-Planning-Institute.org) or call (216) 712-4244

[www.ExitPlanningConference.com](http://www.ExitPlanningConference.com)