

SPONSOR PROSPECTUS

**8TH Annual
Florida Tax Institute
March 10-12, 2021
VIRTUAL**

Florida Tax Institute
THE TAX INSTITUTE FOR PRACTITIONERS®

Sponsored by the
**Florida Tax Education
Foundation, Inc.**

With proceeds to benefit the
**University of Florida
Levin College of Law
Graduate Tax Program**

General Information

This annual institute has been organized by graduates and professors of the University of Florida, Levin College of Law, home of one of the top tax law programs in the United States. The Operating Board consists of Jolyon Acosta, Matt Ahearn, Jack Bovay, David Bowers, Scott Bowman, Michael Burns, Dennis Calfee, Mike Friel, Cristin Keane, Michael Kohner, Summer LePree, Charlene Luke, Fred Murray, Lou Nostro, Brian Phillips, David Pratt, Jeff Scroggin, and Hap Shashy. The Advisory Board includes Ron Aucutt, Les Barnett, Bruce Bokor, Dennis Calfee, Richie Comiter, Lauren Detzel, Sam Donaldson, Mindy Herzfeld, Paul Lee, David Pratt, and Jeff Scroggin.

The University of Florida, Levin College of Law opened its doors in 1909 with 38 students. Currently, the college boasts over 1,000 students, many enrolled in joint J.D./master's or Ph.D. programs, as well as LL.M. and S.J.D. programs. Five presidents of the American Bar Association and more than half the presidents of The Florida Bar are alumni, as well as dozens of state and federal judges, many past chairs of the ABA and Florida Bar tax sections, four Florida governors, and hundreds of state senators and representatives. Eight U.S. Supreme Court Justices, including five in the past five years, have visited and spoken at the college. The annual Ellen Bellet Gelberg Tax Policy Lecture Series presents prestigious state, national and international lecturers on a wide range of tax policy topics.

The graduate tax program was founded in 1974, and quickly became one of the premier advanced degree programs in the country. With a full-time faculty of nine, the program offers an LL.M. in Taxation degree, as well as LL.M. in International Taxation, and S.J.D. in Taxation degrees. The courses are supplemented each year by the Graduate Tax Lecture Series, which features national tax figures speaking on major tax topics. The program publishes the Florida Tax Review, a leading tax review featuring articles, essays and book reviews by leading legal scholars, practitioners, and economists. The Annual International Tax Symposium hosts distinguished international tax scholars in discussions of major issues. Graduates of the program have come from every state in the nation and from numerous foreign countries as well. They have achieved prominence in law firms and accounting firms throughout the United States and abroad, in high governmental positions and professional organizations, and in law schools as professors, scholars and deans.

The Florida Tax Institute has been created by Florida Tax Education Foundation, Inc., a Florida not for profit corporation, in support of the University of Florida, Levin College of Law Graduate Tax Program.

The three day conference program features programming devoted to individual income tax, entity tax, and estate planning. The conference will draw attorneys, trust officers, accountants, insurance and financial planners, and planned giving professionals from across Florida and the United States and will build on the exceptional success of the previous conferences.



Attendees

The Levin College of Law has graduated over 23,000 JDs over the past 40 years and 2,800 LL.M.s in taxation. This program will target leading professionals who provide tax, business, and estate planning advice to their clients, including attorneys, CPAs, wealth management advisors, M&A advisors, risk managers, and financial planners. The program has been developed so attendees can attend one-day, two-day or the full three-day program. As a result, we draw more attendees by allowing them to attend those days that are most applicable to their professional practice. Total attendance is expected to exceed 350 professionals, in addition to many current LL.M. students (tomorrow's professionals).

Programming

The program will feature the top speakers in the United States on tax, business, and estate planning issues. It is designed to be practical, informative, engaging, and state of the art. Speakers and presentations will be announced as we near the program date, allowing the Florida Tax Institute to cover the most current issues and planning ideas. This is a tax program developed by practicing tax professionals for other tax professionals – with a state of the art approach!

Location

The Florida Tax Institute has partnered with GTR, an online event technology industry leader since 1995, to bring the 2021 Tax Institute to our attendees virtually without compromising the event experience.

Why Support the Institute?

The Florida Tax Institute is designed to provide you multiple marketing and sales contacts to some of the leading tax professionals in Florida, the Southeast, and across the United States . . . this is THE program you should sponsor!



Contact

Mary Sawyer
Florida Tax Institute
mary@floridatixinstitute.org
1-866-225-5040

Sponsor and exhibitor arrangements will be confirmed when The Florida Tax Institute receives an executed commitment form (see page 8 of this packet).

By completing, signing and returning an executed commitment form, the sponsor or exhibitor agrees to abide by the rules & regulations outlined in this document.

Virtual Event Exhibitors Guide

Maximize Your Exposure and ROI

The Florida Tax Institute has partnered with online event provider GTR. As an Exhibitor and/or Sponsor, you will have your own virtual booth space within the GTR virtual platform where you can share details about your organization and capture leads. Below is an example of a virtual booth along with an explanation of each of the features:

1 GTR | Event Technology
EXHIBITOR PLATINUM SPONSOR

2 Description
👤
Since 1995, we've provided the conference and trade-show industry with proven technologies designed to improve and simplify every event. Our technologies help event planners with Event Registration, Lead Retrieval, Attendance Tracking, Mobile Apps and Hotel Site Selection. With unrivaled customer support, global reach, and an eye on innovation, we've powered over 12,000 events around the world. Events are hard, we make them easy.

3 Business Categories
VIRTUAL EVENTS EVENT TECHNOLOGY SOFTWARE REGISTRATION

4 ENTER TRADESHOW BOOTH

5 REQUEST INFO

6 MANAGE

3 Showcases
Sponsored By GTR: 11 Ways To Get the Media To Chase YOU For Interviews
Brian Theno GTR Matt Caputo GTR Event Technology
10:00 AM - 11:00 AM (Thu, Dec 17) GTR

Travis Tucker

Matt Caputo
Marketing Manager

Brad Farrar
Director of Enterprise Accounts

Justin Sumwalt
Event Technology Consultant

Brian Theno
Business Development Manager

Company Website
[HTTPS://GTRNOW.COM/](https://gtrnow.com/)

Social Media
[HTTPS://WWW.LINKEDIN.COM/COMPANY/434100](https://www.linkedin.com/company/434100)

Exhibitor Brochures
EXHIBITOR BROCHURE

1 Organization Heading

The first thing a prospective customer will see when they visit your booth. This includes:

- Organization Name
- Logo
- Exhibitor Type
- Sponsor Level

2 Profile

Your profile can contain a limitless amount of information that is available to share with anyone who stops by your booth. Here are just a few examples:

- Description of your organization
- Tags and/or keywords the event host has provided
- Add a video
- Upload brochures, documents, and sales collateral
- Add social links
- And other fields your event organizer has allowed

3 Showcased Sessions

If you are showcasing or sponsoring any sessions during the event, they will be listed here on your booth page. These will show:

- Session name with a link directly to the session
- Time and date of session
- Speaker name(s) and headshot(s)
- Logo of your organization that will also be showcased in main event agenda

4 Live Interaction with Staff

During “exhibiting hours” your staff can broadcast from their office site, warehouse, home, studio or wherever they may be at the time. This is a great opportunity to:

- Get face-to-face with your prospects and existing customers
- Present your offering to anyone who enters your virtual booth space
- Have the opportunity to move into a 1:1 meeting and close the deal



5 Request More Information

Anyone who requests information will come into your lead portal. From here you will be able to view, download, and import directly into your CRM:

- Details of their request
- Time and date of request
- First Name
- Last Name
- Company
- Title
- Email Address
- Phone Number (if available)

6 Manage Your Profile

This is only available to you and your organization's staff. From here you can fully customize your page and manage other features such as:

- Assign or remove booth staff
- Create and manage polls
- Add additional downloadable files
- View and download leads
- View and download booth visits

About Visits

You can see everyone who has visited your page. You will see the attendees first and last name, picture, the number of visits they made to your page, and also the date and time of all their visits.

At any time, you can message visitors directly through the platform



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2021 Matrix of Opportunities

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2021 Sponsorship Level	DIAMOND \$10,000	PLATINUM \$5,000	GOLD \$3,000	SILVER \$1,500	BOOSTER \$750
Transferable full program registrations	10*	6*	4*	2*	1*
Included in the list of sponsors on the Conference Online platform, and Digital Conference Promo	YES	YES	YES	YES	NO
Online Exhibit Booth with branded landing pages, online lead capture, video exhibit booth hours, audio/video chat	YES	YES	YES	YES	NO
Online notification to all attendees	3 push notifications	NO	NO	NO	NO
Featured sponsor of a general session with a 1 to 2 minute address at start of session	YES	NO	NO	NO	NO
Recognition in email event announcements & reminders	YES	YES	NO	NO	NO
Placement on FTI website	Company Logo	Company Logo	Company Logo	NO	NO
Pre-conference attendee list sent 2 weeks prior to the conference	YES	YES	NO	NO	NO
Post conference attendee list sent 30 days after the conference	YES	YES	YES	YES	NO
Further offerings are negotiable	YES	NO	NO	NO	NO

*Created as a marketing opportunity, transferable registrations may be used by the sponsor to staff their exhibit booth and/or may be transferred to an attorney, CPA or advisor selected by the sponsor. Users will receive regular materials provided to each attendee.

Sponsor & Exhibitor Rules and Regulations

Act of God. In the case of cancellation of the conference 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 Florida Tax Institute, this agreement shall terminate, and the Institute shall not be responsible for any damages or expenses incurred by the sponsor or exhibitor in connection therewith.

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

Functions. All functions (e.g., virtual happy hour) scheduled by a sponsor or exhibitor during conference dates must be submitted in writing and pre-approved by the Florida Tax Institute no less than 30 days prior to the start of the conference. This includes, but is not limited to, receptions, virtual happy hours, virtual coffee hours, virtual networking events. Any sponsor /exhibitor deemed to have scheduled a competing event will revoke their right to participate in future Florida Tax Institutes. No Exhibitor or Sponsor may conduct, advertise or sponsor any educational course(s) at the Program if such course(s) occur during the days of the Program.

Liability. Each Sponsor and Exhibitor assumes full responsibility for their acts and omissions and the acts and omissions of their employees, agents, and invitees and each Sponsor and Exhibitor hereby agrees to protect, indemnify, defend, and save the Florida Tax Institute, Florida Tax Education Foundation, Inc., and the University of Florida and their respective employees, agents, officers and board of directors harmless against all claims, losses, liabilities and/or damages to persons or property, governmental charges or fines and attorney's fees arising out of or caused by Sponsor's or Exhibitor's acts or omissions, including without limitation, the transportation, installation, removal, maintenance, occupancy, display or use of exhibits, or of the exhibition premises or a part thereof, excluding any liability solely to the extent caused by the gross negligence or willful misconduct of such indemnified parties and their respective employees, officers and board of directors.

Mailing Lists. Diamond and Platinum Sponsors are entitled to a list of registered attendees prior to the Program. All Sponsors, within 30 days of the conclusion of the event, will be given contact information for each attendee. The electronic file is provided for the sole purpose of contacting attendees of the event to promote your attendance. The list is provided for one-time use and shall not be duplicated or entered into any database. Delivery of this mail list shall not be deemed a waiver or release of any federal or state laws governing "spam" emails.

Programs. Sponsors and Exhibitors may not conduct promotional educational programming including lectures, demonstrations or audiovisual presentations during conference programming hours, without the prior written consent of the Florida Tax Institute.

Payments & Costs. Failure to make a Deferred Payment by the due date may, in the Florida Tax Institute's sole discretion, result in the forfeiture of all payments and any benefits of being a sponsor of this Institute. All Sponsorships and Exhibit and payments commitments are non-refundable.

Speakers. Statements of any Speakers are solely the opinion of the Speaker and the Florida Tax Institute bears no responsibility for or control of such statements or opinions.

Transferable Rights. It is the duty of the Sponsor to provide all contact information (including names, emails, phone numbers and addresses) by the date included in the final Sponsor Kit. The Florida Tax Institute will then deliver the appropriate materials to the transferees. Transferable attendee rights are solely to the entire Program, not individual parts.

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Commitment Form – 2021

Sponsor: _____

Please Print Company Information Exactly As It Should Appear On All Materials

Primary Contact:

Contact Name: _____
Contact Telephone #: _____ Email: _____
Sponsor/Contact Address: _____
City, State & Zip Code: _____
Sponsor Website: _____

Marketing/Secondary Contact:

Contact Name: _____
Contact Telephone #: _____ Email: _____
Sponsor/Contact Address: _____
City, State & Zip Code: _____

Specialty/Discipline (check all that apply):

Accounting Financial Planning Tax Planning
 Banking Insurance Trust Services
 Business Valuation Law Wealth Management
 Estate Planning Tax Preparation Other (please specify): _____

Sponsorship Level (please check preferred level of support):

	Commitment	Total Amount	VIRTUAL Exhibit Space	Payment Due with Commitment
<input type="checkbox"/>	Diamond Sponsor	\$10,000	Yes / No	full payment
<input type="checkbox"/>	Platinum Sponsor	\$5,000	Yes / No	full payment
<input type="checkbox"/>	Gold Sponsor	\$3,000	Yes / No	full payment
<input type="checkbox"/>	Silver Sponsor	\$1,500	Yes / No	full payment
<input type="checkbox"/>	Booster	\$750	No	full payment

**** Please indicate if you will be using the VIRTUAL Exhibit Space.**

Payment

\$ _____ check enclosed payable to “Florida Tax Education Foundation, Inc.” or
\$ _____ please charge my credit card

Credit card number: _____ Exp. Date: _____

Name as it appears on card: _____

By signing below, the undersigned company agrees to fully comply with the rules & regulations outlined within the sponsorship packet and if credit card information is completed, authorize the debiting of the above credit card for all sponsorship fees.

Signature: _____ / Date: _____

Company Name: _____