

SPONSOR PROSPECTUS



*Florida Tax Institute
February 1-3, 2023*

**TAMPA MARRIOTT
WATER STREET**

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, Richard B. Comiter, Carla DeLoach, Mike Friel, Cristin Keane, Michael Kohner, Summer LePree, Charlene Luke, Kateena Manners, Fred Murray, Louis Nostro, A. Brian Phillips, Abraham Shashy and Star Sansone. The Advisory Board includes Ronald Aucutt, Leslie J. Barnett, Bruce Bokor, Lauren Detzel, Sam Donaldson, Mindy Herzfeld, Paul Lee, David Pratt, John J. Scroggin and Donald Tescher.

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 the 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 2 ½ day conference features programming devoted to individual income tax, entity tax, and estate planning. The Institute 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 participate one-day, two-days or the full 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 program is developed by practicing tax professionals for other tax professionals.

Location

The Institute will be held at the Tampa Marriott Water Street, a 15-minute drive from the Tampa International Airport. The redesigned waterfront hotel brings people together as it offers multiple social spaces and amenities, including a rooftop pool, well equipped fitness center and inviting restaurants. It is located near the Tampa Riverwalk, Florida Aquarium, Amalie Arena and Sparkman Wharf.

Why Support the Institute?

The Florida Tax Institute is designed to provide you multiple marketing and sales connections to the leading tax professionals in Florida, the Southeast, and across the United States. You will also meet the next generation of tax professionals who are currently studying at the Levin College of Law.



Contact

Florida Tax Institute

admin@floridataxinstitute.org

1-866-225-5040

Sponsor and exhibitor arrangements will be confirmed when The Florida Tax Institute receives an executed commitment form (see page 12 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.

Matrix of Opportunities

Support Opportunities	DIAMOND <small>(one per industry accepted on a first come, first served basis)</small>	GOLD	SILVER	BOOSTER
Cost	\$20,000	\$6,000	\$3,000	\$2,000
Discipline Exclusivity	✓			
Right of First Refusal for 2024	✓			
Exhibit Booth	12 ft.	6 ft.		
*Transferable Full Program Registrations	10	4	2	1
Two Minute Speaker Introduction	✓			
Logo on Attendee Bag	✓			
Recognition during Welcome Remarks	✓			
Attendee Mailing List	Pre & Post Conference Lists	Post Conference List		
Recognition on Event Materials <i>(Print & Digital)</i>	✓			
Celebratory Dinner Tickets	6	2	1	2
Placement on Program Brochure	✓	✓		
Placement on Exhibit Hall Bingo Card	✓	✓		
Logo on Conference Signage	✓	✓		
Printed Name on Conference Signage			✓	
Website Placement	Logo with link to company website	Logo with link to company website	Link to company website	Link to company website
Ad in Program Materials	Full Page, Color	Full Page, Color	1/2 Page, Color	

* Created as a marketing opportunity, transferrable 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 the regular materials provided to each attendee.

The number of complimentary registrations includes those who will staff the exhibit booth.

Matrix of Opportunities for 10 Year Celebratory Dinner

Support Opportunities	DINNER	COCKTAIL RECEPTION	BOOSTER
Cost	\$10,000	\$7,500	\$2,000
Two Minute Welcome Introduction	✓		
Recognition during Welcome Remarks from the President of Florida Tax Education Foundation	✓	✓	
Logo on Dinner Marketing Materials (Print & Digital)	✓		
Printed Name on Dinner Marketing Materials (Print & Digital)		✓	
Celebratory Dinner Tickets	10	8	2
Attention Grabber		You supply the giveaway and we'll ensure it is distributed to each attendee	
Logo on Signage	✓		
Printed Name on Signage		✓	✓
Website Placement	Logo with link to company website	Link to company website	Link to company website
*Transferrable Full Program			1

Diamond

COST

\$ 20,000

PAYMENT TERMS

\$ 10,000 payable at time of commitment, then remainder by January 13, 2023

PRE-INSTITUTE BENEFITS

- Exclusivity Within Industry
- Logo on Institute's Website with Link to Company Website
- Recognition in Event Marketing Materials, like Early Bird Announcements (*with commitment by August 15, 2022*), Email Announcements & Reminders
- Placement on Institute's Brochure (*with commitment by October 24, 2022*)
- Access to Pre-Conference Mailing List of Attendees (*can be used to establish pre-approved and non-competing events associated with the Institute, intent form required*)

ON-SITE BENEFITS

- Ten Complimentary Full Program Registrations to the Institute
- Complimentary Preferred and Expanded Exhibit Hall Placement (12 ft.)
- Daily Recognition from Podium During Welcome Remarks at the Institute
- Featured Sponsor of a General Session of Choice with a 1-to-2-minute Introduction at the Start of the Session
- Prominent Logo Placement on Conference Signage
- Included on Exhibit Hall Bingo Card
- Opportunity to Place a Full Page, Color Ad in Institute's Materials
- Company Logo on Attendee Bag (*shared benefit*)
- Six Complimentary Tickets to the 10 Year Celebratory Dinner

POST-INSTITUTE BENEFITS

- Access to Post-Conference Mailing List of Attendees
- Right of First Refusal for Same Level of Support for 11th Annual Institute (commitment must be received by June 30, 2023)



10 Year Celebratory Dinner Sponsor

COST	\$ 10,000
PAYMENT TERMS	<ul style="list-style-type: none">• \$5,000 Payable at Time of Commitment, then Remainder Due by January 13, 2023
PRE-INSTITUTE BENEFITS	<ul style="list-style-type: none">• Logo on Institute's Website with Link to Company Website• Logo on Dinner Marketing Materials (<i>Print & Digital</i>)
ON-SITE BENEFITS	<ul style="list-style-type: none">• (1) Reserved Table of 10 at the Celebratory Dinner• Recognition from Podium During Welcome Remarks at Dinner• Featured Sponsor with a 1-to-2-minute Introduction at the Start of the Dinner• Prominent Logo Placement on Dinner Signage• Title Sponsor Recognition on Dinner Program• Opportunity to Place a Full Page, Color Ad in Institute's Program Materials

10 Year Celebratory Cocktail Reception Sponsor

COST	\$ 7,500
PAYMENT TERMS	<ul style="list-style-type: none">• Payable at Time of Commitment
PRE-INSTITUTE BENEFITS	<ul style="list-style-type: none">• Name on Institute's Website with Link to Company Website• Name on Dinner Marketing Materials (<i>Print & Digital</i>)
ON-SITE BENEFITS	<ul style="list-style-type: none">• (1) Reserved Table of 8 at the Celebratory Dinner• Recognition from Podium During Welcome Remarks at Dinner• Giveaway Provided by Company to be Distributed to Dinner Attendees• Printed Name on Dinner Signage

Gold

COST \$ 6,000

PAYMENT TERMS • Full Payment Required at Time of Commitment

PRE-INSTITUTE BENEFITS • Logo on Institute’s Website with Link to Company Website
• Placement on Institute’s Brochure (with commitment by October 24, 2022)

ON-SITE BENEFITS • Four Complimentary Full Program Registrations to the Institute
• Complimentary Exhibit Space (6 ft.)
• Logo Placement on Conference Signage
• Included on Exhibit Hall Bingo Card
• Opportunity to Place a Full Page, Color Ad in Institute’s Materials
• Two Complimentary Tickets to the 10 Year Celebratory Dinner

POST-INSTITUTE BENEFITS • Access to Post-Conference Mailing List of Attendees

Silver

COST \$ 3,000

PAYMENT TERMS Full payment required at time of commitment

ON-SITE BENEFITS • Two Complimentary Full Program Registrations
• Listed on Institute’s Website with Link to Company Website
• Printed Company Name on Signage
• Opportunity to Place a Half Page, Color Ad in Institute’s Materials
• One Complimentary Ticket to the 10 Year Celebratory Dinner

Booster

COST \$ 2,000

PAYMENT TERMS Full payment required at time of commitment

ON-SITE BENEFITS • One Complimentary Full Program Registration
• Name on Institute’s Website with Link to Company Website
• Two Complimentary Tickets to 10 Year Celebratory Dinner
• Sponsor Recognition on Dinner Program
• Printed Name on Dinner Signage

General Exhibitor Information

(applies to both sponsors and exhibitors)

PRELIMINARY EXHIBIT HALL HOURS

Exhibitor set-up will take place the afternoon of Wednesday, February 1, 2023 between 12:00 pm – 2:00 pm (first event with sponsors will be the Wednesday afternoon break) and teardown will take place Friday, February 3, 2023 following lunch.

Exhibitors will be open during all meal and break periods for the duration of the Institute and during the welcome reception the evening of Wednesday, February 1.

**Please note, the specific schedule will be released in the full exhibitor kit sent approximately 1 month in advance of the event.*

ON-SITE EXHIBITOR ACCOMMODATIONS

All exhibit booths will be equipped with one 6 ft. skirted table, one chair, and a wastebasket. Exhibitors will be allotted one 6-foot table for their display (due to the casual nature of the exhibit hall, 10 x 10 booths are not offered). Diamond sponsors will receive a 12 ft. table.

DISPLAY GUIDELINES

Due to space limitations, only tabletop displays will be permitted. This policy will be strictly enforced.

SPACE

Assignment of space will be determined by the Florida Tax Institute, which has the sole right to rearrange the floor plan in the event of conflicts.

EXHIBIT USE

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. ***No exhibitor/sponsor may combine space with another exhibitor/sponsor.***

ATTENDANCE

A company representative must be in attendance at the exhibit booth during the hours the exhibit hall is open.

TAKE DOWN

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

SHARED SPACE

Subletting space is not permitted. Two or more firms may not exhibit in a single space unless arrangements have been approved by the Florida Tax Institute in advance.

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.

Distribution of Material. Except from within rented space or as agreed to by the Florida Tax Institute, exhibitors and sponsors shall not distribute printed matter, samples, souvenirs, and the like. Distribution of materials elsewhere in the exhibit hall, general or breakout session space, in the hotel, or on hotel property is not permitted.

Functions. All functions (e.g., meals or cocktail parties) 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, dinners, hospitality suites, or alternative transportation to off-site conference related 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 Institute.

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.

Damage. Each Sponsor and Exhibitor is solely responsible for damage caused by their acts or omissions to property or persons at the Florida Tax Institute. 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.

Mailing Lists. Diamond Sponsors are entitled to a list of registered attendees prior to the Program. All Diamond, Platinum and Gold 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 payment commitments are non-refundable. Attendees and Sponsors are solely responsible for all travel, freight, storage, transportation, food and hotel costs.

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 Institute, not individual parts.

Commitment Form 2023

*Online form and payment portal is also available at
www.floridatixinstitute.org/sponsors.

Sponsor: _____

Print Company Information Exactly as It Should Appear on Conference 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):

Check ✓	Commitment Level	Total Amount	Exhibit Space **	Payment Due with Commitment
<input type="checkbox"/>	Diamond Sponsor	\$20,000	Yes / No	\$10,000
<input type="checkbox"/>	10 Yr. Celebratory Dinner	\$10,000	No	\$5,000
<input type="checkbox"/>	10 Yr. Celebratory Cocktail Reception	\$7,500	No	Full payment requested
<input type="checkbox"/>	Gold Sponsor	\$6,000	Yes / No	Full payment requested
<input type="checkbox"/>	Silver Sponsor	\$3,000	No	Full payment requested
<input type="checkbox"/>	Booster	\$2,000	No	Full payment requested

**** Please indicate if you will be using the 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: _____

Sponsor Supplemental Event Intent Form

Company Name_____

When would you like to host your supplemental event?

Date_____ Time_____

Where do you intend to host the event?

What type of event would you like to host (please describe)

Who will be invited to attend?

___All conference attendees

___Other, please describe_____

Would you like the Florida Tax Institute to make an announcement(s) from the podium about your event?

___Yes

___No

Please add any additional details you feel would be helpful for the operating board here:

By signing below, I/we agree to comply with the rules & regulations outlined within the sponsorship packet and specifically for supplemental events. I/we understand that the only list of attendees available to promote the event is the pre-conference list that consists of email and mailing addresses, provided approximately 30 days prior to the beginning of the conference. If my event is approved, I understand that timing cannot be adjusted to conflict with any conference-related event and agree to notify the Tax Institute immediately if any event-related details change from what I have submitted above. Furthermore, I understand that the Tax Institute cannot guarantee attendance at my/our event.

Please complete this portion if the contact person is different than the person noted on the commitment form:

Signature_____

Title_____

Contact Name_____

Telephone #_____ Email_____

Address_____

City, State & Zip Code_____