

# Florida Tax Institute

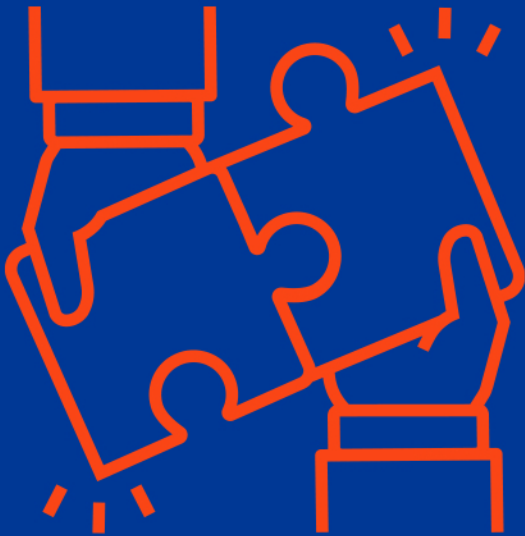
## February 14 –16, 2024

### JW Marriott Tampa 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**

# Sponsor Prospectus



**FLORIDA TAX  
INSTITUTE** //

THE TAX INSTITUTE FOR PRACTITIONERS®



[admin@floridataxinstitute.org](mailto:admin@floridataxinstitute.org)

## **ABOUT THE FLORIDA TAX INSTITUTE**

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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.

This annual institute has been organized by graduates and professors of the University of Florida Levin College of Law Graduate Tax Program which was founded in 1974 and is celebrating its 50<sup>th</sup> anniversary this year. The University of Florida Levin College of Law Graduate Tax Programs are widely recognized by tax scholars and practitioners nationwide as leading programs for the advanced study of tax law.

## **CONFERENCE INFORMATION**

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The 2½ 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.

The program will feature 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. This program is developed by practicing tax professionals for other tax professionals.

## **HOTEL INFORMATION**

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We are delighted to return to [Tampa, Florida](#) and the [JW Marriott Tampa Water Street](#) and [Tampa Marriott Water Street](#). JW Marriott Tampa Water Street combines modern luxury with the sophisticated energy of Tampa's vibrant downtown district; the Tampa Riverwalk, Amalie Arena and other attractions are right at your fingertips. The redesigned Tampa Marriott Water Street hotel is connected to the JW Marriott Tampa Water Street via a glass skybridge on the third floor.

Hotel rooms at discounted FTI rates are available. Reservation information will be included in the conference sponsor logistics kit.

## **GENERAL INFORMATION**

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**DATE** February 14 – 16, 2024

**LOCATION** Education Sessions and Exhibit Hall at the JW Marriott Tampa Water Street  
510 Water Street, Tampa, FL 33602, 800-228-9290

Overnight accommodations available at the Tampa Marriott Water Street  
505 Water Street, Tampa, FL 33602, 800-228-9290

\*A convenient pedestrian bridge connects the two Marriott properties.

**ATTENDEES** Tax Attorneys, CPAs, Trust Officers, Estate Planners, Financial Planners, Appraisers, CLUs and ChFCs, as well as current University of Florida Graduate Tax Program students.

## SUPPORT OPPORTUNITIES

	DIAMOND SPONSORSHIP	GOLD SPONSORSHIP	SILVER SPONSORSHIP
Cost	\$20,000	\$7,500	\$4,500
Discipline Exclusivity	✓		
Right of First Refusal for 2025	✓		
Exhibit Booth	Expanded size	Standard size	Standard size
Preferred Exhibit Hall Placement	✓	✓	
Conference Registrations for Representatives or Gifts	12	6	3
2.5-Minute Speaker Introduction	✓		
2-Minute Speaker Introduction		✓	
2-Minute Firm-Provided Video on Conference Webpage and Running During Breaks	✓		
1-Minute Firm-Provided Video Running During Breaks		✓	
Logo on Attendee Bag	✓		
Attendee Mailing List with email	Pre & Post Conference	Post Conference	
Logo Placement on Power Station Signage	✓		
Focus Access at Sponsor Attendee Mingle	✓	✓	
Logo on Program Brochure	✓	✓	
Logo on Exhibit Hall Bingo Card	✓	✓	
Logo on Conference Signage	Top Billing	✓	
Printed Name on Conference Signage			✓
Verbal Appreciation from Podium	✓	✓	✓
Website Placement	Logo with link to company website	Logo with link to company website	Link to company website
Ad in Online Program Materials	Full Page, Color	Full Page, Color	Half Page, Color
50 <sup>th</sup> Anniversary - Exclusive Benefits	TBD	TBD	TBD

## **DIAMOND SPONSORSHIP**

**\$20,000**

### **GENERAL BENEFITS**

- Discipline Exclusivity (multiple sponsors accepted from different professional disciplines)
- 12 Registrations, including most meals
- Focus Access at Sponsor Attendee Mingle
- Logo / Link on Conference Webpage and Attendee Registration Page
- Pre- and Post-Conference Attendee List Including Emails
- Full Page, Color Ad in Online Program Materials

### **SPEAKING & RECOGNITION BENEFITS**

- 2.5-Minute Speaker Introduction
- 2-Minute Firm Provided Video Running During Breaks
- Verbal Appreciation from Podium

### **LOGOS & PLACEMENT**

- Logo on Attendee Bag
- Logo on Program Brochure
- Logo on Conference and Power Station Signage
- Preferred and Expanded Exhibit Hall Placement
- Included on Exhibit Hall Bingo Card (incentivizes attendees to visit your booth)

### **CONTINUING THE RELATIONSHIP**

- Right of First Refusal for 2025 Diamond Sponsorship with commitment by March 31, 2024
- Early Bird Discount for 2025 participation

## **GOLD SPONSORSHIP**

**\$7,500**

### **GENERAL BENEFITS**

- 6 Registrations, including most meals
- Focus Access at Sponsor Attendee Mingle
- Logo / Link on Conference Webpage
- Post-Conference Attendee List Including Emails
- Full Page, Color Ad in Online Program Materials

### **SPEAKING & RECOGNITION BENEFITS**

- 2-Minute Speaker Introduction
- 1-Minute Firm Provided Video Running During Breaks
- Verbal Appreciation from Podium

### **LOGOS & PLACEMENT**

- Logo on Program Brochure
- Logo on Conference Signage
- Preferred Exhibit Hall Placement
- Included on Exhibit Hall Bingo Card (incentivizes attendees to visit your booth)

### **CONTINUING THE RELATIONSHIP**

- Early Bird Discount for 2025 participation

Direct inquiries about sponsorship opportunities to Sarah Butterfield • [admin@floridatixinstitute.org](mailto:admin@floridatixinstitute.org)

2001 Crocker Rd., Ste. 510 • Westlake, OH 44145 • (866) 225-5040

## **SILVER SPONSORSHIP**

**\$4,500**

### **GENERAL BENEFITS**

- 3 Registrations, including most meals
- Link on Conference Webpage
- Half Page, Color Ad in Online Program Materials

### **SPEAKING & RECOGNITION BENEFITS**

- Verbal Appreciation from Podium

### **LOGOS & PLACEMENT**

- Printed Name on Program Brochure
- Printed Name on Conference Signage

### **CONTINUING THE RELATIONSHIP**

- Early Bird Discount for 2025 participation

## **\*SPECIAL OPPORTUNITY: STUDENT NETWORKING LUNCHEON SPONSORSHIP** **\$2,500**

### **GENERAL BENEFITS**

- 1 Registration, including most meals
- Prominent signage at the Student Networking Luncheon
- Verbal Appreciation from Podium the day of the Luncheon
- Link on Conference Webpage

## **EXHIBIT HALL BASICS**

- Booth assignments are handled internally.
- The exhibit hall utilizes tabletop exhibits rather than 10 x 10 booths separated by pipe and drape. **Only table top displays are permitted** (with the exception of Diamond sponsors that have expanded space.) Small retractable signage (3-foot pop-up banners) are acceptable when placed in a location that does not interfere with the flow of traffic and/or sight lines.
- Each exhibitor area will include one six-foot dressed table, two chairs, and a wastebasket.

### Shipping & Receiving

Sponsors and exhibitors will ship materials directly to the hotel; FTI does not utilize an exhibition company. Instructions will be provided in the final sponsor logistics kit, which is distributed late fall.

### Set-Up, Tear-Down, and Hall Hours (subject to adjustment)

Set-up:	Tuesday, February 13, 2023 between 12:00 pm and 4:00 pm
Tear-down:	Friday, February 16, 2023 at 12:00 pm

The Exhibit Hall will be open during meal and break periods beginning after set-up and until tear-down time. Exhibitors will be open during all meal and break periods for the duration of the conference and during the welcome reception on Wednesday, February 14. A final schedule of events will be published in the conference sponsor logistics kit. **Those who dismantle before the published tear-down time may revoke the right to participate at future FTI programs.**

### Step 1 - identify your level of support

	<b>Commitment</b>		
	Diamond Sponsor	\$20,000	
	Gold	\$7,500	
	Silver	\$4,500	
	Student Networking Luncheon	\$2,500	

## Step 2 - tell us about your firm

HOW SHOULD YOUR COMPANY NAME APPEAR IN OUR MATERIALS? *Please be exact and print legibly.*



Discipline / Specialty (check all that apply or fill in the "other" section):

<input type="checkbox"/> Accounting	<input type="checkbox"/> Estate Planning	<input type="checkbox"/> Law	<input type="checkbox"/> Trust Services
<input type="checkbox"/> Banking	<input type="checkbox"/> Financial Planning	<input type="checkbox"/> Tax Preparation	<input type="checkbox"/> Wealth Management
<input type="checkbox"/> Business Valuation	<input type="checkbox"/> Insurance	<input type="checkbox"/> Tax Planning	<input type="checkbox"/> Other (please specify):

Website Address

Primary Contact

Telephone #	Email
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Address

City, State &amp; Zip Code

Signature \_\_\_\_\_

*By signing above, I/we agree to comply with the rules & regulations included within this prospectus.*

Additional/Marketing Contact

(This person will be copied on all pre-conference details and communication, including the final logistics kit that provides information on set-up, hall hours, shipping, and requests the firm's attendees, etc. If none, leave blank.)

Marketing Contact

Telephone #	Email
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Address

City, State &amp; Zip Code

### Step 3 - provide payment

*Payment required  
with commitment;  
this page is  
your receipt.*

Enclosed is our \$\_\_\_\_\_ check payable to "FTI" **or**

Bill credit card number	Exp. Date
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[illegible]

Signature \_\_\_\_\_

Online form and payment portal is available at [www.floridataxinstitute.org/sponsors](http://www.floridataxinstitute.org/sponsors).

**Direct inquiries about sponsorship opportunities to Sarah Butterfield • [admin@floridataxinstitute.org](mailto:admin@floridataxinstitute.org)**  
2001 Crocker Rd., Ste. 510 • Westlake, OH 44145 • (866) 225-5040

## **MAILING LIST USAGE POLICY**

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All conference exhibitors receive one pre-conference and one post-conference mailing list of contact details for use in promoting their attendance at the annual conference. This list will include name, designations/discipline, firm name, and postal mailing address to the extent that they were provided by the attendee for those who have not opted out of receiving sponsor messages.

**The pre-conference list will be emailed to the primary and marketing contact four weeks prior to the program and the post-conference list will be sent two weeks after the conclusion of the program.** By accepting delivery of these lists, a sponsoring or exhibiting company agrees to the terms outlined below.

- User may use attendee contact information for an approved use **ONCE** each time an attendee list is distributed. The pre-conference list may only be used pre-conference and the post-conference list must be used within thirty (30) days of the date on which it was sent to the sponsoring or exhibiting firm by FTI.
- FTI and Florida Tax Institute names or logos may not be used on any material mailed by user. The exhibiting company must reference their attendance at the "11<sup>th</sup> Annual Florida Tax Institute".
- An approved use includes a postal mailing.
- Use of the list to gather phone numbers is prohibited, as is telephoning those who appear on the lists.
- User may not copy, replace, or duplicate the information contained within, any portion thereof, or extract or retain any information there from. User may not at any time permit any attendee names and addresses to pass into the hands of any other person, association, organization, or company.
- User will hold the provider 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.
- User agrees to forward within ten (10) days following receipt, any letters or documents (or copies thereof) of complaints received from attendees or a report of verbal complaints by attendees regarding the user's mailing, the matter transmitted therein, or the offered product or service.
- The user is solely responsible for determining that the information provided is sufficiently accurate for the user's purposes.

Any prohibited or unauthorized use by sponsoring or exhibiting company or failure to report attendee complaints as described above shall constitute a material breach of the exhibitor agreement and may exclude company from participation in future FTI events.

## **EXHIBITOR RULES AND REGULATIONS**

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These instructions and regulations have been formulated for the best interest of the exhibitor and conference attendees.

**Commitment, Payment & Cancellation** • Full payment is required with the commitment form. Exhibitor commitments are non-refundable. FTI has the right to refuse participation to any person or firm that, in its sole discretion, does not support the mission of the organization or the educational and other purposes of the Florida Tax Institute.

**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, frustration of purpose, commercial impracticability, or any other cause beyond the control of the FTI, this agreement shall terminate, and FTI 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 FTI. FTI reserves the right to adjust the floor plan in the event of conflicts, either in advance of the conference or on-site.



**Character of Exhibits** • No exhibit shall 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 audio-visual 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.

**Dismantling** • No booth may be dismantled until the official tear-down time. Any exhibitor that begins dismantling before this time may revoke their right to exhibit at any future FTI conference.

**Distribution of Printed Matter** • Except from within rented space or as purchased as a part of this prospectus, exhibitors shall not distribute printed matter, samples, souvenirs, and the like. Distribution of materials elsewhere in the exhibit hall, session space, in the hotel, or on hotel property is not permitted.

**Functions, Supplemental & Social Events** • All functions scheduled by a sponsor / exhibitor during conference dates must be submitted in writing and pre-approved by the FTI no less than 30 days prior to the start of the conference. This includes, but is not limited to, receptions, large group dinners, hospitality suites, or alternative transportation to off-site conference related events. Small group dinners are excluded from this requirement. Any exhibitor deemed to have scheduled a competing event may revoke their right to participate in future FTI conferences. Pre-paid exhibitor fees will not be refunded.

**Insurance & Liability** • Exhibitor assumes entire responsibility and hereby agrees to protect, indemnify, defend, and save the FTI and its employees, independent contractors, and board of directors 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, or for the conduct of or harm caused to attendees at any special supplemental event hosted by the exhibitor, excluding any such liability caused by the sole negligence of FTI and its employees and board of directors.

**Programming** • Exhibitors may not conduct promotional or educational programming including lectures, demonstrations, or audiovisual presentations during conference programming hours.

**Property Damage** • 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 damage, deface, or destroy.

**Shipping Instructions, AV, Electricity & Telephone Service** • Information regarding these items will be available to exhibitors prior to the conference and will be distributed via email (the "Logistics Kit").

**Staffing and Behavior of Exhibitor Representatives** • A company representative must be in attendance at the exhibit booth during the hours the exhibit hall is open. Any exhibitor representative or firm displaying inappropriate or aggressive behavior and/or sales tactics, including, but not limited to, touching participants and/or their apparatus without their express permission, will be asked to leave immediately and may result in the removal of an exhibit or cancellation of a sponsorship with no refund of fees, including, but not limited to the exhibitor fee, transportation and lodging costs, meals, shipping costs, etc.

**Subletting Space** • Subletting or sharing of space is not permitted.