

Florida Tax Institute

THE TAX INSTITUTE FOR PRACTITIONERS[®]

SPONSOR PROSPECTUS



**8th Annual Tax Institute
March 10-12, 2021
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**

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, 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, Fred Murray, 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).

General Information, continued

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 Institute will be held at the brand new JW Marriott Tampa Water Street a 15 minute drive from the Tampa Airport. Opening in late 2020, the JW Marriott will bring modern luxury to the redefined Water Street Tampa neighborhood. Thoughtfully designed to bring people together, the hotel will offer multiple social spaces and amenities, including a full-service spa and fitness center; an expansive pool and sun terrace; a full-service restaurant with indoor and outdoor seating, and a rooftop lounge and terrace on the 26th floor boasting sweeping views of the waterfront and downtown.

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. Supporting this program will provide access to the leading tax professionals in Florida and the U.S....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 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

Sponsorship Level & Number at Level	DIAMOND <i>(one per industry accepted on a first come, first served basis)</i>	PLATINUM	GOLD	SILVER	BOOSTER
Cost	\$20,000	\$10,000	\$6,000	\$3,000	\$1,500
Exhibit Booth	12 ft.	6 ft.	6 ft.	6 ft.	none
Transferrable Full Program Registrations	10*	6*	4*	2*	1
On-Site Recognition	Verbal announcement from podium daily, logo on signage	Verbal announcement from podium & logo on signage	Logo on signage	Printed company name on signage	None
Microphone Time	Two minutes with which to address attendees	Yes	No	No	No
Advertising in Event Materials	Full page ad	Full page ad	Half page ad	Half page ad	None
Website Placement	Logo with link to website	Logo with link to website	Logo with link to website	None	None
Recognition in Email Event Announcements & Reminders with Commitment by August 1, 2020	Yes	No	No	No	No
Placement on Program Brochure with Commitment by August 1, 2020	Company Logo	Company Logo	Company Logo	No	No

Pre-Conference Mailing List (can be used to establish pre-approved and non-competing events associated with the Institute, intent form required)	Yes	Yes	No	No	No
Post-Conference Mailing List	Yes	Yes	Yes	No	No
Right of First Refusal for Same Level, 2022 Institute (Commitment must be received by July 1, 2021)	Yes	No	No	No	No
Logo on Attendee Bag (shared benefit)	Yes	No	No	No	No

* 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.**

Diamond

Cost \$ 20,000

Payment Terms \$ 10,000 payable at time of commitment, remainder by January 15, 2021

Pre-Institute Benefits

- Exclusivity Within Industry
- Right of First Refusal until July 1, 2020
- Logo on Institute Website with Link to Company Website
- Recognition in Email Event Announcements & Reminders with Commitment Form received by August 1, 2020
- Logo On Printed Program Brochure with Commitment Form received by August 1, 2020)
- Access to Pre-Conference Mailing List of Attendees

On-Site Benefits

- Ten Complimentary Full Program Registrations
- Complimentary Priority Exhibit Space (12 ft.)
- Daily Verbal Recognition from Podium
- Prominent Logo Placement on Signage
- Two Minutes to Welcome Guests
- Full Page Ad in Program Materials
- Company Logo on Attendee Bag (shared benefit)

Post-Institute Benefits

- Access to Post-Conference Mailing List of Attendees
- Right of First Refusal for Same Level of Support for 9th Annual Institute (commitment must be received by July 1, 2021)

Platinum

Cost \$ 10,000

Payment Terms \$ 5,000 payable at time of commitment, remainder by January 15, 2021

- Pre-Institute Benefits**
- Logo on Institute Website with Link to Company Website
 - Logo On Printed Program Brochure with Commitment Form received by August 1, 2020
 - Access to Pre-Conference Mailing List of Attendees

- On-Site Benefits**
- Six Complimentary Full Program Registrations
 - Complimentary Exhibit Space (6 ft.)
 - Verbal Recognition from Podium
 - Logo Placement on Signage
 - Full Page Ad in Program Materials

- Post-Institute Benefits**
- Access to Post-Conference Mailing List of Attendees

Gold

Cost \$ 6,000

Payment Terms Full payment required at time of commitment

Pre-Institute Benefits

- Logo on Institute Website with Link to Company Website
- Logo On Printed Program Brochure with Commitment Form received by August 1, 2020)

On-Site Benefits

- Four Complimentary Full Program Registrations
- Complimentary Exhibit Space (6 ft.)
- Logo Placement on Signage
- One-Half Page Ad in Program Materials

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
- Complimentary Exhibit Space
- Printed Company Name on Signage
- One-Half Page Ad in Program Materials

Booster

Cost \$ 1,500

Payment Terms Full payment required at time of commitment

On-Site Benefits One Complimentary Full Program Registrations

General Exhibitor Information

(applies to both sponsors and exhibitors)

Preliminary Exhibit Hall Hours

Exhibitor set-up will take place the morning of Wednesday, March 10, 2021 between 8:30 & 10:00 am (first event with sponsors will be the Wednesday morning break) and teardown will take place following the Friday, March 12, 2021 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, March 10, 2021.

**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 as noted above.

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 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.

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 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. Attendees and Sponsors are solely responsible for all travel, freight, storage, 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.

Transferrable 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.

Florida Tax Institute 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):

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

Sponsorship Level (please check preferred level of support):

Commitment	Total Amount	Exhibit Space **	Payment Due with Commitment
Diamond Sponsor	\$20,000	Yes / No	\$10,000
Platinum Sponsor	\$10,000	Yes / No	\$5,000
Gold Sponsor	\$6,000	Yes / No	full payment
Silver Sponsor	\$3,000	Yes / No	full payment
Booster	\$1,500	No	full payment

**** 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 For

Company Name _____

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

Contact Name _____

Telephone # _____ Email _____

Address _____

City, State & Zip Code _____

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 committee 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.

Signature _____

Title _____