



# Technology Tools for Today

## SPONSORSHIP OPPORTUNITIES

2020 ADVISOR CONFERENCE

MARRIOTT MARQUIS SAN DIEGO MARINA | SAN DIEGO, CA

FEBRUARY 17- FEBRUARY 20, 2020

PRESENTED BY: JOEL BRUCKENSTEIN  
CONFERENCE CHAIRMAN



## A LETTER TO SPONSORS

Dear Friends:

We would like to extend to you a special invitation to join us for our **2020 Technology Tools for Today® T3 Conference**, to be held on **February 17 – February 20, 2020** at the fabulous Marriott Marquis San Diego Marina in San Diego, CA.

If you are new to the Technology Tools for Today® Conference, you will learn what our existing sponsors already know: the benefits of sponsoring are three-fold. First, T3 gives you access to the highest level of independent financial advisors, all of whom come to T3 to make purchase decisions in line with their strategic technology visions, as influenced by you, the sponsor. Second -- and not so obvious to new sponsors -- is the collegiality in the exhibit hall that lends itself to collaboration and deal-making between and amongst T3 sponsors. Many sponsors tell us they benefit as much from the interaction with potential technology partners as they do the advisor attendees. And third, T3 gains more and more press coverage by major news outlets every year, which benefits our sponsors by publicizing their latest expansion efforts and new product/service announcements."

Technology expert **Joel Bruckenstein** will chair the conference. If you provide technology/practice management support to the financial advisor community, this is the one event of the year that specifically targets and connects you to those advisors who most need your services.

For 2020, we will be offering four levels of sponsorship- Platinum plus, Platinum, Gold and Silver. Each level's benefits are described in the enclosed sponsorship forms. We are offering your firm the option to garner further recognition with additional sponsorship opportunities listed in the enclosed sponsor forms.

Find out why technology leaders such as **Fidelity Investments, TD Ameritrade Institutional, MoneyGuidePro, eMoney Advisor** have chosen to sponsor the **Technology Tools for Today® T3 Conference**. This event will be a great success, and we sincerely hope to welcome your firm to our family of sponsors.

**Please send in your registration form with the required minimum deposit ASAP to reserve your booth now! The 2019 show was a complete sellout, so we only have a limited amount of time for returning sponsors to pre-reserve their booth space before we accept applications from new sponsors. Booth placement will be determined by sponsorship level and the order in which deposits are received.**

Sincerely,

Joel Bruckenstein, Conference Chair

**2020 Technology Tools for Today® T3 Conference**



## 2020 SPONSORSHIP OPPORTUNITIES

Benefits	Platinum Plus   \$25,000	Platinum   \$18,500	Gold   \$15,000	Silver   \$7,000
Booth	Double Booth   First to Choose Location	Double Booth	Double Booth	Booth
Speaking Opportunity	Conference General Session	Super Session	Breakout Session	Flash Session
Complimentary Registrations	7 Representatives	5 Representatives	3 Representatives	2 Representatives
Promotional Items in Conference Bag	✓	✓	✓	
Coffee Break Co- Sponsorship	✓	✓		
Company Logo on Conference Signage	✓	✓		
Listing on Conference Website	Prominent	Prominent	Link	Recognition

***Exclusive Offer for Sponsors | Discounted Opportunity to Exhibit in T3's Virtual Exhibit Hall***

T3 Virtual Exhibit Hall offers a single location for advisory firms to find the best technology solutions on the market today and compare their features. Enhance your online presence by uploading your company's products and outlining product features for virtual attendees to get the best preview of how your product solutions fulfill their needs.

**Add on Cost: \$5,000.00 for a full year (\$1,000.00 discount) <https://www.t3virtualexhibithall.com/>**



## 2020 SPONSORSHIP ADD ONS

<b>Hotel Key Cards</b>	<b>\$3,500</b>	<b>Wi-Fi Hot Spot</b>	<b>\$3,500</b>
One sided hotel key cards with your company logo, given to all attendees		Sponsor will choose Wi-Fi password. Conference signage with recognition will be provided, and each morning a push notification will go out.	
<b>Badge Holders</b>	<b>\$3,500</b>	<b>Branding on Check-In Kiosks</b>	<b>\$3,500</b>
Your company logo on badge holders given to all attendees		Sponsor logo to appear on the T3 Conference Check-In kiosk tablets and pedestals. Visible to all attendees as they check-in.	
<b>Tote Bags</b>	<b>\$3,500</b>	<b>Sponsor Branding on Conference App</b>	<b>\$4,000</b>
Your company logo on tote bags available to all attendees		Prominent branding to appear on all pages of the conference app with link to company profile. App is live 90 days before the conference	
<b>Sponsor a Breakfast</b>	<b>\$3,500</b>	<b>Video Station Sponsorship</b>	<b>\$7,500</b>
Sponsor a breakfast during the conference. Sponsor will have logos on napkins provided, as well as signage		Please call or email if interested	
<b>Sponsor a Break</b>	<b>\$3,500</b>	<b>Roving Reporter Sponsorship</b>	<b>\$4,000</b>
Sponsor a break during the conference. Sponsor will have logos on napkins provided, as well as signage		Please call or email if interested	
<b>Sponsor a Lunch</b>	<b>\$3,500</b>	<b>Sponsor Branding on Twitter Feed</b>	<b>\$2,000</b>
Sponsor a lunch during the conference. Sponsor will have logos on napkins provided, as well as signage		Sponsor logo to appear on evolving Twitter feed that plays throughout the conference in all meeting rooms between sessions.	
<b>Sponsor the Cocktail Reception</b>	<b>\$5,500</b>	<b>Charging Stations</b>	<b>\$4,000</b>
Sponsor the cocktail reception during the conference. The sponsor will have logos on napkins provided, as well as signage		Sponsor logo to appear on the T3 Conference charging station. Charging stations will be in a very visible location for any conference attendees to use.	
<b>Conference Session Introduction (if available)</b>	<b>\$1,000</b>	<b>Student Travel Grant (Donation)</b>	<b>\$1,000</b>
Please call or email if interested		The student scholarships support of the cost of students attending the T3 conference, giving them a chance to participate in the student competition and explore the world of FinTech.	
<b>Elevator Wraps (if available)</b>	<b>\$4,000</b>	<b>Student Team Travel Grant (Donation)</b>	<b>\$4,000</b>
Branded clings on all hotel elevators		The student scholarships support of the cost of student teams attending the T3 conference, giving them a chance to participate in the student competition and explore the world of FinTech.	



## SPONSORSHIP APPLICATION/ CONTRACT TO EXHIBIT

**Organization** (exactly how you want it in the program)

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**Mailing Address**

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**City, State, Zip Code**

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**Web Address**

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**Phone Number**

**Email**

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**Main Sponsor Contact Name**

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**Phone Number**

**Email**

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**Secondary Sponsor Contact Name (Marketing/PR)**

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**Phone Number**

**Email**

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Please "X" which sponsorship you are applying for and whether you would like to exhibit in the T3 Virtual Exhibit Hall:

Platinum Plus  
\$25,000.00

Platinum  
\$18,500.00

Gold  
\$15,000.00

Silver  
\$7,000.00

Virtual Exhibit Hall Add On: \_\_\_\_\_

**Additional Sponsorship Events or Items, please indicate you interest below.**

*Price will be confirmed upon acceptance.*

_____	\$	_____
_____	\$	_____
_____	\$	_____

**Total Sponsorship Fee Due\***      \$ \_\_\_\_\_

Special Instructions/Comments:

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Return to: T3 Conference; c/o AIM Meetings; 315 South Patrick Street, Floor 2; Alexandria, VA 22314

Questions: 703-867-1875 | Fax: 703-549-9074 | Email: [pgalanty@aimmeetings.com](mailto:pgalanty@aimmeetings.com)



## PAYMENT SCHEDULE

A non-refundable deposit of \$1,000 is due at the time application is submitted. If you are paying in installments, they will be split in equal increments on July 30, Sept. 30, and Dec. 30. (If your application is received after Sept. 30th, then increments will be adjusted accordingly. If your application is submitted after Dec. 30th, total fee will be charged at time of submission).

### Installment Payment Dates: July 30, Sept. 30, Dec. 30

Payment Method (Select One):

\_\_\_\_\_ Pay in Full by Credit Card (Listed Below)      \_\_\_\_\_ Pay in Installments by Credit Card (Listed Below)  
\_\_\_\_\_ Pay in Full by Check      \_\_\_\_\_ Pay in Installments by Check (Dates listed above)

Credit Card Details:

\_\_\_\_\_ Visa      \_\_\_\_\_ MasterCard      \_\_\_\_\_ American Express

Credit Card Number: \_\_\_\_\_ Security

Expiration Date: \_\_\_\_\_ Code: \_\_\_\_\_

Name on Card: \_\_\_\_\_

Card Billing Address: \_\_\_\_\_

Cardholder \_\_\_\_\_

Signature: \_\_\_\_\_

Send Checks To:      **Virtual Office News**  
c/o AIM Meetings & Events, Inc.  
315 South Patrick Street, Floor 2  
Alexandria VA 22314

**Cancellation Policy: Deposits are non-refundable.** All cancellations must be made in writing and will be subjected to a \$1,000 cancellation fee. If cancellation occurs after October 30, 2019 and before December 1, 2019, 50% of the total sponsoring fee agreed upon in sponsor’s Application/Contract to Exhibit will be due and payable with written cancellation. If cancellation occurs on or after December 1, 2019, 100% of the total sponsoring fee agreed upon in sponsor’s Application/Contract to Exhibit will be due and payable with written cancellation. The conference reserves the right to cancel sponsor exhibits if strikes, natural disasters, disruption in the transportation network or other events make it impossible or invasive to hold exhibits. If cancellation occurs under this provision, exhibit fees will be refunded to the extent funded by cancellation insurance.

**AGREEMENT-** The undersigned on behalf of the applicant company, its employees, agents, and contractors, agrees to comply with rules and regulations set forth on the “Exhibitor Rules and Regulations.” Exhibitor acknowledges receipt of this document. Once accepted, this completed form is considered binding on both exhibitor and the conference.

\_\_\_\_\_  
**Signature-Authorized Representative of Sponsor**      **Company**      **Date**



## EXHIBITOR RULES AND REGULATIONS

### 1. Contract for Space

The receipt by the conference of your signed Application/Contract to Exhibit accompanied by payment of the initial required deposit will constitute a reservation for booth space. All approved applications will be accepted on a first come/first serve basis. Once allotted space has been filled, a waiting list will be maintained with space assigned if it becomes available or in the event of a cancellation. The conference reserves the right to cancel all or part of the conference and shall be obligated only to return that portion of prepaid exhibit fees not expended or committed.

### 2. Exhibitors | All exhibitors must meet the following criteria:

- A. Uphold the highest standards and professional image of Professional Financial Planners
- B. Exhibit only products or services which directly relate to technology solutions for Professional Financial Planners.
- C. Agree not to sell any products or services.
- D. Each sponsor who desires to sell their product/service on the show floor must register and obtain any local or state sales certificate and comply with all the local regulations regarding the sale of such material. T3 is not responsible for obtaining any certificates on behalf of any sponsor.

### 3. Exhibit Regulations

- A. No private functions may take place during the conference without prior consent of conference management.
- B. Set up displays in accordance with the items specified by the conference. Material displayed must be educational in nature. All exhibits must be confined to the booth assigned. Storage of all literature and catalogs must be on or under the tables.
- C. No audio presentations are permitted.
- D. Occupy the booth space rented. At least one representative must be at the booth during all published exhibit times.
- E. You may distribute give-aways of your choice and have private drawings for door prizes at your booth.
- F. Use the official on-site service contractor for drayage, rigging, electrical, plumbing, vacuuming, custom cleaning and all booth furnishings including audio/visual equipment and labor necessary to complete stated services. The service contractor will be informed of all accepted exhibitor applications. Exhibitors assume all responsibility for set-up, removal, maintenance and use of the exhibit area, including fees incurred as a result of such use. Security will only be provided overnight only.
- G. Agree to abide by all laws, ordinances and regulations. Exhibitors shall not engage in illegal activities.
- H. The conference reserves the right to limit or change categories of products which may be exhibited or to prohibit any exhibit which it determines in its discretion may diminish the goodwill of the conference. If an exhibit is prohibited for these reasons the conference may refund exhibit fees.

I. Early breakdown is strictly prohibited.

### 4. Assignment

Exhibitors are prohibited from transferring or assigning their designated booth space.

### 5. Liability

- A. Exhibitor agrees to assume all risks of loss, injury, theft or damage of any kind to any exhibit or component thereof, and to assume all liability for damage to property, person or persons arising from accidental or other causes incidental to operations of exhibit and hereby releases the conference, attendees, representatives, and employees of the Marriot Marquis San Diego Marina from any and all claims of injury, loss or damage.
- B. The conference expressly disclaims all liability, expressed or implied, for the truth or legality of the content of any exhibit or material distributed.

### 6. Enforcement

The conference reserves the right to refuse or revoke any person or company from the exhibited area. And the conference may amend, add or delete from these resolutions as it deems necessary and such shall be fully binding on exhibitors.

### 7. No Use of Name

Exhibitor acknowledges that the conference is the sole owner of its name and marks in any advertising or other communication. Exhibitor may not utilize the conference verification/acceptance process in any ways to state or imply an endorsement of its products or services by the conference. Exhibitor agrees to indemnify the conference from any loss or damages arising from violation of this rule or from any communication which states or implies endorsement or the exhibitor or its products or services by the conference.

### 8. Sponsor Information

Sponsors agree to have their public information posted on the T3 app. Sponsors will not have the ability to approve this information since it will be gathered from information on their website. Sponsors who agree to sponsor additional logoed items, will provide T3 with their logo and agree that it be used appropriately.

### 9. Impossibility

The conference reserves the right to cancel the exhibits if strikes, natural disasters, disruption in the transportation network or other events make it impossible or inadvisable to hold events. If cancellation occurs under this provision, exhibit fees will be returned to the extent funded by the exhibitor's insurance.



Signature \_\_\_\_\_ Date: \_\_\_\_\_