Exhibit and sponsor prospectus

National and Sophisticated Tax Planning Conferences with Private Foundation Summit

**Nov. 16–17, 2020**
National and Sophisticated Tax Planning Conferences | Live Online

**Nov. 18–19, 2020**
Private Foundation Summit | Live Online
About the event

The National Tax Conference assembles the most prominent group of national tax professionals and government leaders. Attendees come for the most up-to-date tax information, changes in federal tax laws, as well as a full day of presentations by key IRS officials. This is your chance to engage and sell them with outstanding networking and exhibit time.

The AICPA Sophisticated Tax Planning for Your Wealthy Clients is led by top-level financial experts who will discuss IRS initiatives, estate taxes, proven retirement techniques, life insurance planning and more. Participants will receive tax updates and cutting-edge strategies in order to offer strategies and solutions to their wealthy clients while also enhancing their status as a trusted advisor. This “how-to” conference also includes a networking reception where the participants can share ideas and create new contacts with the industry’s best.

The signature learning event on private foundations is back, and by popular request, this year’s Private Foundation Summit is adding more practical sessions. Direct from true thought leaders in philanthropy and experienced faculty on private foundations, gain practical guidance you can’t get anywhere else.
National Tax

Attendee demographics

**Business category**
Attendees: 500
- Public Accounting: 74%
- Business & Industry: 16%
- Consulting: 5%
- Other: 5%

**Top titles**
- Partner: 42%
- Manager/Director: 19%
- Staff: 12%
- Sole Practitioner: 10%
- C-Suit: 7%
- Shareholder/Owner: 4%
- Other: 6%

**Firm size**
- Sole Practitioner: 12%
- 2–50 employees: 45%
- 51–99 employees: 16%
- 100–500 employees: 5%
- 500–1,000 employees: 1%
- 1,000+ employees: 3%

**Attendees by region**
- South: 48%
- West: 12%
- Midwest: 15%
- Northeast: 23%
- Outside of U.S./Unknown: 2%
Sophisticated Tax Planning for Your Wealthy Clients

Attendee demographics

Business category
Attendees: 250
- Public Accounting: 72%
- Business & Industry: 20%
- Consulting Firms: 8%

Top titles
- Partner: 42%
- Manager/Director: 22%
- Staff: 12%
- Sole Practitioner: 8%
- CFO: 5%
- Shareholder/Owner: 4%
- Other: 7%

Firm size
- 1–10 employees: 37%
- 11–50 employees: 17%
- 51–99 employees: 14%
- 100–500 employees: 7%
- 501–1,000 employees: 3%
- 1,000+ employees: 2%

Attendees by region
- South: 33%
- West: 9%
- Midwest: 18%
- Northeast: 39%
Private Foundation Summit

Attendee demographics

Business category
Attendees: 91

- Public Accounting: 60%
- Business & Industry: 37%
- Consulting Firms: 3%

Top titles

- Partner 23%
- C-Suite 16%
- Manager 13%
- Staff 12%
- Director 10%
- Accounting/Financial Reporting – Director/Manager 7%
- Shareholder/Owner 4%
- Sole Practitioner 4%
- Other 11%

Number years as CPA

- 0–5 years 4%
- 6–10 years 9%
- 11–20 years 33%
- 21–30 years 32%
- 30+ years 22%

Attendees by region

- South 27%
- West 17%
- Midwest 16%
- Northeast 31%
- Outside of U.S./Unknown 0%
Be a sponsor.

Sponsorships position your company as a leader at a time when key decision-makers are eager to learn and ready to help their firm grow. You’ll have exposure to the industry’s buying audience, top-level CPA firm partners and managers, plus others in key financial roles. We offer sponsorships at many price-points and a variety of value added benefits. Our sponsorships are designed to stretch your marketing budget and help your business STAND OUT as an industry leader.

Recommended exhibitors

Consultants and leaders in ...

- Payroll/Payment Systems
- Automation/Paperless
- Cloud Computing/Cloud Solutions
- E-Signatures
- Financial Services/Business Advisory
- Family Office
- Fraud Prevention
- Tax Automation
- Website Management
- Workflow
- Analytic Systems
- Estate Planning
- College Savings Plans
- Accounting and Auditing
- Valuation Companies
- Captive Insurance
- Tax Incentives/Cost Segregation
- Strategic Planning
- Investment Advisors
- Law Firms
- Technology/IT Services
- Practice Management Software
- Financial Planning & Analysis
- Document Management
- Data Security
- Risk Strategies & Management
- Information Management
- Online Communication
- Education and Research
## Executive level sponsor

Strategically build your custom sponsorship package from our a la carte offerings. Reach Executive Level status based on your spending, and earn exclusive brand building benefits! Contact your sales manager for more details.

<table>
<thead>
<tr>
<th>Level</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Platinum</td>
<td>$16,000</td>
</tr>
<tr>
<td>Gold</td>
<td>$13,000</td>
</tr>
<tr>
<td>Silver</td>
<td>$10,000</td>
</tr>
</tbody>
</table>

### Executive level benefits

- Priority placement in the virtual exhibit hall
- Sponsor recognition in the virtual lobby
- Company listing on AICPAConferences.com
- Additional CPE online registrations:
  - Silver — one (1)
  - Gold — two (2)
  - Platinum — three (3)

## Speaking sponsorships

### $10,000

**Solution session**

- 50-minute session worth 1 CPE credit
- Session attendee contact information for one-time use (includes email addresses)
- Session recording available on the AICPAConferences.com archives page
- Two (2) online conference registrations
- One (1) speaker registration
- Only available to executive level sponsors

### $7,500

**TECH demo**

- Pre-recorded 25-minute presentation (no CPE credit) available during a scheduled break
- Recording available on the AICPAConferences.com archives page
- Demo attendee contact information for one-time use (includes email addresses)
- Two (2) online conference registrations
- One (1) speaker registration
## Sponsorship opportunities

### Digital sponsorships

**$10,500**

<table>
<thead>
<tr>
<th>Virtual streaming</th>
<th>45-second online commercial streamed before opening general session</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Two (2) additional commercial* plays throughout conference</td>
</tr>
<tr>
<td></td>
<td>Banner ad and dedicated tab on AICPAConferences.com event summary</td>
</tr>
<tr>
<td></td>
<td>Hosted chat lobby for the online audience during a session break</td>
</tr>
<tr>
<td></td>
<td>Four (4) online conference registrations</td>
</tr>
</tbody>
</table>

**$7,500**

<table>
<thead>
<tr>
<th>Closed captioning</th>
<th>Sponsor recognition in closed captioning message in every session</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>One (1) 30-second online commercial* play per day</td>
</tr>
<tr>
<td></td>
<td>Logo on AICPAConferences.com event home page with closed-captioning</td>
</tr>
<tr>
<td></td>
<td>information</td>
</tr>
<tr>
<td></td>
<td>Logo in pre-event email to all attendees as the closed-captioning sponsor</td>
</tr>
<tr>
<td></td>
<td>Two (2) online conference registrations</td>
</tr>
</tbody>
</table>

**$7,500**

<table>
<thead>
<tr>
<th>Online handouts</th>
<th>Banner ad on AICPAConferences.com handouts page</th>
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<tbody>
<tr>
<td></td>
<td>Logo in pre-event handouts email to all attendees</td>
</tr>
<tr>
<td></td>
<td>Two (2) online conference registrations</td>
</tr>
</tbody>
</table>

**$6,500**

<table>
<thead>
<tr>
<th>Virtual reception activity</th>
<th>Sponsor will welcome attendees to virtual reception activity</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>One (1) 30-second online commercial* played before one (1) session</td>
</tr>
<tr>
<td></td>
<td>Logo on signage in virtual Activity Room</td>
</tr>
<tr>
<td></td>
<td>Two (2) online conference registrations</td>
</tr>
</tbody>
</table>
# Sponsorship opportunities

## $7,500

<table>
<thead>
<tr>
<th>Online archives</th>
<th></th>
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<tbody>
<tr>
<td>• Banner ad on AICPAConferences.com archives page (added 4–6 weeks post-event)</td>
<td></td>
</tr>
<tr>
<td>• Logo in post-event archive email to all attendees</td>
<td></td>
</tr>
<tr>
<td>• Two (2) online conference registrations</td>
<td></td>
</tr>
</tbody>
</table>

## $7,500

<table>
<thead>
<tr>
<th>Technical support</th>
<th></th>
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<tbody>
<tr>
<td>• Banner ad on AICPAConferences.com technical support page</td>
<td></td>
</tr>
<tr>
<td>• Logo on help desk in virtual lobby</td>
<td></td>
</tr>
<tr>
<td>• Logo in pre-event archive email to all attendees</td>
<td></td>
</tr>
<tr>
<td>• Two (2) online conference registrations</td>
<td></td>
</tr>
</tbody>
</table>

## $7,500

<table>
<thead>
<tr>
<th>Music</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>• Sponsor recognition listed in each session welcome window</td>
<td></td>
</tr>
<tr>
<td>• Logo in pre-event handouts email to all attendees</td>
<td></td>
</tr>
<tr>
<td>• Two (2) online conference registrations</td>
<td></td>
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</tbody>
</table>

## $7,500

<table>
<thead>
<tr>
<th>Door Dash meal credit</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>• Sponsor recognition of Door Dash meal credit provided to all attendees</td>
<td></td>
</tr>
<tr>
<td>• Logo in pre-event and post-event email to all attendees</td>
<td></td>
</tr>
<tr>
<td>• Two (2) online conference registrations</td>
<td></td>
</tr>
</tbody>
</table>
# Sponsorship opportunities

## $5,000

**BINGO!**
- Attendees visit BINGO! participant booths to earn points by chatting with reps and learning about products/services
- Sponsor supplied prize of $100 minimum value
- Logo on signage promoting BINGO! in virtual Lobby and Exhibit Hall
- Sponsor recognition on Leaderboard
- Two (2) online conference registrations

## $5,000

**Activity break**
- Sponsor recognition during a session activity break (i.e., chair yoga, stretches, etc.)
- Logo placement may be included if sponsor provides/records activity
- Two (2) online conference registrations

## $1,500

**Online commercial***
- 30-second online commercial played before one (1) session
- Commercial visible by all attendees via archives (added 4–6 weeks post-event)
- Logo on pre-session window and post-session email sent to all session participants
- One (1) virtual session handout

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* Session(s) with commercial viewing will be selected in conjunction with AICPA Staff and are subject to availability.
Exhibit opportunities

$3,000

3-D virtual booth
- Customizable branding opportunities (logo, graphic images, banner ad, etc.)
- Information card
- Video upload
- Resources/handouts window
- Personalized contacts list
- Live public and private chat feature
- Metrics including users, visits, and downloads

Additional benefits:
- Company listing on AICPAConferences.com
- Company listing in the conference mobile app
- Pre and post-conference attendee list with USPS mailing addresses for one-time use
- One (1) online conference registration

BINGO!

A fun and engaging game to bring attendees to your booth. Points are earned while moving throughout the exhibit hall, visiting each participating exhibitor and learning about your products/services. Attendees are entered into drawings for donated raffle prizes.

$500

BINGO! participant
- Participant supplies prize of $100 minimum value