

# 2014 Tax and Accounting Conference

## SPONSORSHIP OPPORTUNITIES

September 28–October 1, 2014

JW Marriott Desert Ridge Resort and Spa  
Phoenix, AZ

## Sponsorship Contract

### TERMS AND CONDITIONS

Based on mutual consideration, this Sponsorship Contract will serve as a binding agreement between The Investment Company Institute (ICI) and the Sponsor with respect to agreed-upon sponsorship opportunities at the 2014 Tax and Accounting Conference (the Conference or TAC) to be held September 28–October 1, 2014, at the **JW Marriott Desert Ridge Resort and Spa in Phoenix, Arizona.**

**An authorized agent of the sponsoring firm acknowledges and accepts the following terms and conditions of this contract by completing the Sponsorship Registration form on the TAC website and indicating the specific sponsorship slot requested. Sponsor will be provided with recognition and benefits described in the 2014 ICI TAC Sponsorship Opportunities and Benefits page for the applicable slot.**

### ACCEPTANCE

All sponsorship slots are available on a first-come, first-served basis. ICI has the absolute right to limit the number of total sponsors and to select sponsors at its sole discretion. Acceptance of a sponsorship request by ICI is based upon slot availability at the time of receipt of the completed website registration. Sponsors have no right or authority to make any determinations with respect to the conduct, participants, presenters, display, performance, content, setup, or any aspect of the Conference or sponsored event.

### PAYMENT

The following payment condition applies:

- » Full payment must accompany online sponsorship registration. Sponsorship will not be recognized until payment has been received in full.

### CANCELLATIONS

Cancellations must be received in writing by **Friday, August 1, 2014**, by Shani Armon at [sarmon@ici.org](mailto:sarmon@ici.org). All cancellations received up until this date will be eligible for a refund minus a \$300 administration fee. After **Friday, August 1**, no refunds will be issued.

### COSPONSORING

Sharing sponsorship slots is permitted upon approval by ICI. Please contact Shani Armon via email at [sarmon@ici.org](mailto:sarmon@ici.org) if you feel a shared sponsorship is appropriate.

## ATTENDEE SOLICITATION

Sponsors will receive a copy of the current attendee lists on a regular basis of approximately every other week beginning August 11, 2014. If sponsoring company has not submitted payment by this time, no lists will be issued. Please note that only attendees who wish to share their contact information will be on the lists provided. **Use of these lists is for preconference solicitation only.** No separate solicitation of attendees of past ICI meetings is permitted.

Sponsors may only contact attendees from past meetings by receiving prior written permission from ICI. If there are any blind or mass marketing solicitations sent out separately from use of the authorized current attendee list, such action will be cause for immediate cancellation of sponsorship participation and possible denial of sponsorship participation at future events.

## SPONSORSHIP TOTE BAG INSERTS

Accepted sponsorships receive a complimentary tote bag insert if included in the particular reserved slot. All slots and benefits are defined in the **Sponsorship Opportunities and Benefits document**. Sponsors are allowed one tote insert per company, and the insert must be approved by ICI. If the sponsorship qualifies for a complimentary tote insert, the firm will receive a code to use when registering for a tote insert.

### Golf Hole Sponsorship

If you plan to host an event at your golf hole, or plan to provide catering or a contest, a representative from your organization must be present at all times at the designated hole for the duration of the tournament. The representative is responsible for the setup and management of all sponsored hole activities. ICI will provide signage, tent, and 6' table at each hole.

### Desert Kivas Sponsorship

If you sponsor an event during the Desert Kivas reception, a representative from your organization must be present at all times during the designated event. ICI will provide appropriate signage and will be responsible for the planning, setup, and teardown of the sponsored event.

## SIGNAGE AND MATERIALS

ICI will be responsible for the design and placement of all signage at the Conference. The Sponsor will not place any signage or other materials inside or outside the sponsored event, including all Conference space or public grounds adjacent to where the Conference is held, without the prior written consent of ICI. All requests for signage displays, placement, and setup and teardown times must be sent to ICI for approval before **August 15, 2014**. If additional signage displays are approved outside of the signage provided by the ICI, the Sponsor is financially responsible for the design and production of the signage. The sponsoring company is also responsible for the costs of setup and teardown of signage at the Conference.

## DISTRIBUTION OF PRINTED MATERIALS

Sponsors shall not distribute any printed materials, samples, souvenirs, etc., at the sponsored event without the prior written consent of ICI. All requests for material distribution at sponsored events must be submitted in writing, and a sample of the material must be sent to ICI for approval before **August 15, 2014**. Sponsors must obtain the prior written approval of ICI for any distribution of material at the TAC and sponsored event. Permission to distribute printed materials, samples, souvenirs, etc., at the sponsored event does not constitute the endorsement or sponsorship of any sponsor, any other firm or company, or any publication, or its content by ICI. Such permission also does not authorize Sponsor to imply or state in any written or oral communication that such printed matter is so endorsed or sponsored. Under no circumstances may such printed matter use ICI's name, trademark, or logo for any purpose without prior written permission by ICI.

## INDEMNIFICATION

Sponsor hereby agrees to indemnify, defend, reimburse, and hold harmless ICI and its respective officers, directors, employees, volunteers, and representatives against any and all claims, loss, damage, or expense (including attorneys' fees) that may arise in connection with or be asserted against, resulting from, imposed upon, incurred, or suffered as a result of Sponsor's participation in the Conference.

## TERMS AND CONDITIONS

ICI shall have discretion in the interpretation and enforcement of the terms and conditions in this contract and all aspects of the Conference, and the power to make, from time to time, such reasonable amendments thereto and to establish such further terms and conditions as it shall consider necessary for the proper conduct of the Conference, including the sponsorship opportunity, provided such new terms and conditions do not materially alter or diminish the contractual rights of sponsorship. All matters, issues, or questions not covered by the Terms and Conditions are subject to the sole discretion of ICI.

I have read the above contract and agree to abide by the Terms and Conditions governing participation in the Conference.

Sponsor (company name):

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By (signature):

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Print name and title:

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Date:

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A copy of this signed agreement must be submitted within 48 hours of sponsorship registration.

Accepted by ICI

By (signature):

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Print name and title:

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Date:

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Return sponsorship contract to:

Shani Armon

Fax: 202-403-3580

Email: sarmon@ici.org