

# SOFE 2017 CONFERENCE

## CDS Sponsorship Opportunities



Marco Island, FL • July 23-26, 2017  
JW Marriot Marco Island



**SOCIETY OF FINANCIAL EXAMINERS®**



# SOCIETY OF FINANCIAL EXAMINERS®

Career Development Seminar (CDS)

## **Sponsorship Opportunities**

July 23 – 26, 2017

JW Marriott Marco Island, Marco Island, FL

To: Potential Sponsors of the 2017 SOFE CDS

This will outline the Sponsorship Program opportunities for SOFE's 2017 CDS in Marco Island, FL.

The CDS Sponsorship Program has been developed to provide increased benefits and value to potential sponsors while simplifying the process to the extent possible. The Program increases the transparency of the process and gives consideration to the increasing pressure from various State Agencies regarding sponsorship related issues and the perception of potential conflicts of interest. The Program also allows for the attendees interaction with potential sponsors to be at the discretion of the attendee. Highlights of the CDS Sponsorship Program include the following:

- Sponsorships will continue based upon level of contribution (i.e. Platinum, Gold, Silver, Bronze and General).
- Benefits will be attributable to each level of sponsorship. ***Please see page 2.***
- Platinum, Gold and Silver Level Sponsors will be allowed a table for display in a designated Sponsor Area at CDS. Prominent signage will be on display to direct attendees to this area during CDS hours at their leisure.
- Platinum and Gold Level sponsors will be allowed to provide a 1-page insert to be included in the attendee registration package.
- Bronze and General level sponsors will be allowed to display information at a designated table in the CDS registration area.
- Specific CDS events will not be tied to a specific sponsor (except for "Platinum Events" which will include the Annual Meeting Luncheon and the General Luncheon during which time recognition of all Platinum Level Sponsors will be made).
- Platinum, Gold, Silver and Bronze Level Sponsors will be recognized during the General Sessions.
- All sponsors will be recognized in a listing in the registration brochure, the official posted CDS program and the CDS onsite App.
- Signage recognizing all sponsors will be posted in the General Registration Area and the designated Sponsor Area.
- Platinum level sponsors will be allowed two attendees at the Saturday Night New Member Reception and the Tuesday State Chair Luncheon.
- Sponsors of the Special AES Extended Session will be noted in special signage and also in the posted program brochure and the CDS onsite App.

**Sponsorship forms must be submitted to SOFE Headquarters by Friday, March 3, 2017 (for inclusion in the registration brochure).**

Questions related to the CDS Sponsorship Program may be directed to SOFE at [b.schlevensky@sofe.org](mailto:b.schlevensky@sofe.org).

*Please Note Itemized Sponsorship Details on Page 2*



# SOCIETY OF FINANCIAL EXAMINERS®

## 2017 SOFE CDS Sponsorship Program

July 23 – 26, 2017

JW Marriott Marco Island, Marco Island, FL

### ***Important - Please Review Benefits Itemization:***

#### **Platinum Level**

This level is for any sponsorship of **\$10,000.00** and is the highest level of sponsorship available. Benefits include:

- All General Sponsor benefits plus signage recognizing Platinum Events (Monday Annual Meeting and Tuesday General Luncheon).
- Special introduction and recognition at the Annual Meeting luncheon.
- Sponsor may place a banner or table top display booth in a designated area during CDS
- Two representatives from the Sponsor can attend the Saturday Night First Time Attendee Reception and the Tuesday State Chair Luncheon.
- Promo insert in the Final Registration Package provided to attendees on site.
- Premier signage recognizing Platinum Level Sponsorship in the CDS registration area.

#### **Gold Level**

This level is for any sponsorship of **\$6,000.00**. Benefits include:

- Special Signage recognizing Gold Level Sponsorship in the CDS registration area.
- Additional recognition of the sponsorship will be given at the General Sessions.
- Sponsor may place a banner or table top display booth in a designated areas during CDS
- All General Sponsor benefits.

#### **Silver Level**

This level is for any sponsorship of **\$3,000.00**. Benefits include:

- Special signage recognizing Silver Level Sponsorship in CDS registration area.
- Additional recognition of the sponsorship will be given at the General Sessions.
- Sponsor may place a banner or table top display booth in a designated area during CDS
- All General Sponsor benefits.

#### **Bronze Level**

This level is for any sponsorship of **\$1,000.00**. Benefits include:

- Special signage recognizing Bronze Level Sponsor in CDS registration area.
- Additional recognition of the sponsorship will be given at the General Sessions.
- All General Sponsor benefits.

#### **General Sponsor**

This level is for any sponsor of **\$500.00**. Benefits include:

- General signage in CDS registration area.
- Thank you in the *InSight* publication and on the CDS website.
- Listing of all sponsors in the Registration Brochure, posted Program and CDS Onsite App.
- May place promotional material on a materials table near the registration desk during CDS.

#### **Special AES Extended Session- July 26 – 27.**

Sponsorships are available for the Special AES Extended IT Session July 26<sup>th</sup> and July 27<sup>th</sup>. The sponsorship can be purchased alone or in addition to another sponsorship. The cost is **\$1,000 per sponsor** with an unlimited number of sponsorships available. The benefits include signage and recognition at the Special AES Extended Session as well as inclusion under a separate heading in the Registration Brochure, posted Program and CDS Onsite App



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2017 Career Development Seminar (CDS)

July 23 - 26, 2017

JW Marriott Marco Island, Marco Island, FL  
**Sponsorship Agreement Form**

**NOTE: For inclusion in the Registration Brochure, you must submit this form by March 3, 2017.**

**Company Name:** (Please print this **exactly** as it is to be listed in the final program and on signage):

\_\_\_\_\_

**Contact:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**City/State/Zip** \_\_\_\_\_

**Phone:** (\_\_\_\_\_) \_\_\_\_\_ Ext. \_\_\_\_\_ Fax (\_\_\_\_\_) \_\_\_\_\_

**Email (required):** \_\_\_\_\_

**After Reviewing the 2017 Benefits Itemizations on Page 2, Check Sponsorship Requested:**

Platinum \$10,000    Gold \$6,000    Silver \$3,000    Bronze \$1,000    General \$500

AES session \$1,000 \*

*\*May be added to a sponsorship level or purchased alone*

**Payment Information:**

Credit Card Company:    VISA    MasterCard    American Express

Credit Card Number \_\_\_\_\_ Expiration Date \_\_\_\_\_

Cardholder's Name \_\_\_\_\_

Cardholder's Signature \_\_\_\_\_

**Total Amount \$** \_\_\_\_\_

**If paying by check**-please make checks payable to SOFE

Mail **check** with a *copy* of this form to:

SOFE  
7044 South 13<sup>th</sup> St.  
Oak Creek, WI 53154

Questions related to the Sponsorship Program may be directed to SOFE at [b.schlevensky@sofe.org](mailto:b.schlevensky@sofe.org).

***Thank you for your continued support of the Society of Financial Examiners.***

**Please send this form to [b.schlevensky@sofe.org](mailto:b.schlevensky@sofe.org) (or fax to SOFE's inbox at 414-768-8001)**

Society of Financial Examiners 7044 South 13<sup>th</sup> Street, Oak Creek, WI 53154