



## ANNUAL CONFERENCE SPONSORSHIP OPPORTUNITIES

# 2020 ANNUAL CONFERENCE

November 13 - 15 | San Antonio, TX

20/20 VISION

### INCLUDED WITH SPONSORSHIPS

	<sup>NEW!</sup> Diamond Sponsor \$3,000	Platinum Sponsor \$1,500	Gold Sponsor \$1,000	Silver Sponsor \$750	Bronze Sponsor \$500
20-minute promotional presentation of your product during conference (one half of a breakout session)*	X				
5-minute promotional presentation at conference kickoff		X			
Article or ad in <i>The Account</i> newsletter	X	X	X		
One complimentary conference registration	X	X	X		
Acknowledgement on the conference website	X	X	X		
Sponsorship of ONE AADMM "News You Can Use"	X	X	X	X	
One demonstration table for your products or services	X	X	X	X	X
Recognition in conference promotional emails to our full email list	X	X	X	X	X
Logo on signage at conference**	X	X	X	X	X
Logo included in the printed materials distributed at the conference, and on the new conference mobile app	X	X	X	X	X

See exhibitor information sheet for details about the exhibit package.

\* Diamond sponsorships are limited to four, and are available on a first-come, first-served basis. Because they are a part of the conference program, diamond sponsorships must be contracted and paid by March 31.

\*\*Specific sponsorships include additional exposure. Meal or session sponsorships include company logo on table signage. See descriptions on the contract for further details.



## ANNUAL CONFERENCE | NOVEMBER 13 - 15 | SAN ANTONIO, TX

### About The American Association of Daily Money Managers

The American Association of Daily Money Managers (AADMM) is a national membership organization representing individuals and businesses in the growing profession of daily money management. These professionals provide personal financial services to seniors and older adults, people with disabilities, busy professionals, high net worth individuals, small business owners, and others.

A daily money manager (DMM) brings clarity and order to an individual's daily management of personal bills, budgets, and record-keeping. DMMs assist clients with activities such as bill paying, day-to-day banking, budgeting, insurance paperwork, and organizing records and receipts in preparation for income tax filing. Daily money managers are not financial planners or advisers, and do not provide investment, tax or legal advice unless certified to do so. They do not take the place of accountants, attorneys, investment advisors, or social workers; they complement services provided by these professionals.

### About the AADMM Annual Conference

Each year, daily money management professionals from across the nation gather for AADMM's annual conference. This event brings together like-minded professionals for a weekend of educational sessions and networking events. It is the ideal platform to share your brand, products and services with your target customers. The 2020 Annual Conference will be held November 13 – 15 in San Antonio, Texas, with the theme: **20/20 Vision**.

### AADMM Annual Conference Sponsorship Options

Multiple sponsorship levels are available. AADMM's current conference schedule does not allow for an exhibit hall; however, we will have exhibit/demonstration tables available for bronze-level sponsors and above, and will designate times during the schedule when attendees can network with sponsors.

**Diamond, Platinum, Gold, Silver, and Bronze sponsorship opportunities allow you to:**

- *Increase visibility for your company*
- *Generate greater awareness of your product*
- *Introduce new products*
- *Showcase products with demonstrations*
- *Educate current and potential clients about your services*



# SPONSORSHIP OPPORTUNITIES

## Choose an opportunity from one of the following sponsorship levels

***The deadline to be eligible for sponsor benefits as outlined is September 11 (March 31 for Diamond Sponsorship).***

Sponsorships are made available through submission of the AADMM sponsor agreement. You will be contacted when your agreement and payment have been confirmed by the AADMM business office. If you need additional details about sponsorship opportunities, please contact [info@aadmm.com](mailto:info@aadmm.com) or 814-357-9191.

### **(NEW!) DIAMOND SPONSORSHIP | \$3,000**

***Four opportunities, available on first-come, first-served basis***

- Twenty-minute promotional presentation during a conference session. Two sponsors will split a 50-minute breakout session.
- One article OR half page ad in four issues of AADMM's newsletter, *The Account*.
- Half-page ad in ONE issue of AADMM's newsletter, *The Account*.
- Link on AADMM website conference page.
- One conference registration – includes access to educational programming and conference materials. Travel not reimbursed.
- One demo table for duration of conference.
- Sponsorship of ONE AADMM "News You Can Use" e-blast distributed to AADMM membership. (*Average 800 members.*)
- An electronic version of our conference attendee list (of those who opt in) will be available upon request after the close of conference.
- Recognition in the conference on-site program and signage at the event. (The printed program is distributed to all attendees and sponsors at the event.)
- Recognition in conference promotional emails to our full email list (includes members/non-members/affiliates).

### **PLATINUM SPONSORSHIP | \$1,500**

- Five-minute promotional presentation at conference kickoff
- One article OR half page ad in four issues of AADMM's newsletter, *The Account*.
- Half-page ad in ONE issue of AADMM's newsletter, *The Account*.
- Link on AADMM website conference page.
- One conference registration – includes access to educational programming and conference materials. Travel not reimbursed.
- One demo table for duration of conference.
- Sponsorship of ONE AADMM "News You Can Use" e-blast distributed to AADMM membership. (*Average 800 members.*)
- An electronic version of our conference attendee list (of those who opt in) will be available upon request after the close of conference.
- Recognition in the conference on-site program and signage at the event. (The printed program is distributed to all attendees and sponsors at the event.)
- Recognition in conference promotional emails to our full email list (includes members/non-members/affiliates).

### **GOLD SPONSORSHIP | \$1,000**

- Half-page ad in ONE issue of AADMM's newsletter, *The Account*.
- Link on AADMM website conference page.
- One conference registration – includes access to educational programming and conference materials. Travel not reimbursed.
- One demo table for duration of conference.
- Sponsorship of ONE AADMM "News You Can Use" e-blast distributed to AADMM membership. (*Average 800 members.*)
- An electronic version of our conference attendee list (of those who opt in) will be available upon request after the close of conference.
- Recognition in the conference on-site program and signage at the event. (The printed program is distributed to all attendees and sponsors at the event.)
- Recognition in conference promotional emails to our full email list (includes members/non-members/affiliates).

### **SILVER SPONSORSHIP | \$750**

- One demo table for duration of the conference
- Sponsorship of ONE AADMM "News You Can Use" e-blast distributed to AADMM membership. (*Average 800 members.*)
- An electronic version of our conference attendee list (of those who opt in) will be available upon request after the close of conference.
- Recognition in the conference on-site program and signage at the event. (The printed program is distributed to all attendees and sponsors at the event.)
- Recognition in conference promotional emails to our full email list (includes members/non-members/affiliates).

### **BRONZE SPONSORSHIP | \$ 500**

- One demo table for duration of the conference
- Recognition in the conference on-site program and signage at the event. (The printed program is distributed to all attendees and sponsors at the event.)
- Recognition in conference promotional emails to our full email list (includes members/non-members/affiliates).

# SPONSORSHIP AGREEMENT

**ANNUAL CONFERENCE | NOVEMBER 13 – 15 | SAN ANTONIO, TX**

In this box, provide the information as you want it used on promotional materials.

Company Name: \_\_\_\_\_

Name and Title of Person You Want Listed on Conference Promotions – (Give the name of the person you want people at the conference to contact within your company. **Information written here is for promotional purposes on the web and printed materials**):

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

Phone: \_\_\_\_\_ Website: \_\_\_\_\_

Email: \_\_\_\_\_

Facebook: \_\_\_\_\_ Twitter: \_\_\_\_\_

***Please email a high-quality company logo and session description to [info@aadmm.com](mailto:info@aadmm.com)***

## Complete this section to become a sponsor:

We hereby agree to contribute the sum of \$\_\_\_\_\_ to be a sponsor at the level noted below. We understand that benefits for sponsorship will be supplied as indicated at specific levels in the sponsorship packet, provided that full information and a commitment for payment are received by AADMM no later than Friday, September 11, 2020. For more information about sponsorship opportunities or details about benefits, contact the AADMM business office: [info@aadmm.com](mailto:info@aadmm.com) or 814-357-9191.

Indicate your sponsorship below by placing a checkmark next to your selected level:  
(details listed on previous page)

\_\_\_ \$3,000 DIAMOND SPONSOR | must be contracted and paid by March 31, 2020

\_\_\_ \$1,500 PLATINUM SPONSOR

\_\_\_ \$1,000 GOLD SPONSOR

\_\_\_ \$750 SILVER SPONSOR

\_\_\_ \$500 BRONZE SPONSOR

\_\_\_ We can't Participate in 2020, but please contact us with sponsorship opportunities in 2021.

**BOTH pages of this sponsor agreement must be completed and submitted to AADMM.**

# AGREEMENT FOR SPONSORSHIP | 2020 AADMM ANNUAL CONFERENCE

Company name: \_\_\_\_\_

**Conference Registration:** Use the line below to register the person who will use the complimentary registration as outlined at your level of sponsorship (Diamond, Platinum, and Gold only). Write the name as it should appear on the name badge. If you need more registrations than allotted, contact the AADMM business office at 814-357-9191.

Name: \_\_\_\_\_

To decline your complimentary registration indicate here:  NO, we will not be using our complimentary conference registrations.

**IMPORTANT Company Logo and Description:** ALL Sponsors must provide an electronic/digital copy of the company logo for use on signs, the mobile app, and other acknowledgements, along with a company description. The logo should be submitted with this agreement, but absolutely no later than September 11, 2020. A high-resolution color JPG or PNG provides the best reproduction.

An electronic copy of our logo and company description will be emailed to info@aadmm.com

**No sponsorship is considered reserved until AADMM receives this agreement with authorized signature and commitment for sponsorship payment. Sponsor CANCELLATION POLICY: Cancellations received by Friday, August 28 will result in a refund of 75%; 25% will be retained for administrative services. No refunds will be given after September 11. Because the Diamond Sponsorship is part of the program, this payment is non-refundable unless AADMM is able to replace the sponsoring company with a new sponsor; if replaced, the standard cancellation policy applies.**

## ALL Sponsors must complete the section below: THIS AGREEMENT IS AUTHORIZED BY

Hold Harmless Agreement – The sponsor listed herein assumes full responsibility and agrees to indemnify and defend AADMM and the conference hotel and their respective employees, agents, and officers against any claims and expense arising out of the use of the premises at said conference hotel during the AADMM conference on November 13 – 15, 2020. The sponsor understands that neither AADMM nor the conference hotel maintains insurance covering the sponsor's property, and it is the sole responsibility of the sponsor to obtain such insurance. We fully agree to the terms here of:

Name and Title of Authorizing Agent \_\_\_\_\_

Authorizing Agent's Signature \_\_\_\_\_

Mailing Address for Invoice \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip code \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

**TOTAL PAYMENT IN THE AMOUNT OF: \$\_\_\_\_\_ (Please make a copy for your records.)**

Method of Payment:  Check/Money Order Enclosed  Payment by Credit Card

We require an emailed receipt when payment is processed.

MAIL check or money order payable to AADMM  
with both pages of the Agreement to the  
AADMM business office:

174 Crestview Drive, Bellefonte, PA 16823  
Phone: 814-357-9191  
Email: info@aadmm.com

Our Federal ID #52-1944683

Allow 7-10 business days to process payment.

FAX both pages of the Agreement with credit card information to:  
814-355-2452

Credit Card Type (Visa, MasterCard, etc.): \_\_\_\_\_

\_\_\_\_\_  
Name on card (print)

\_\_\_\_\_  
Account Number Security Code

\_\_\_\_\_  
Exp. Date Signature

**BOTH pages of this sponsor agreement must be completed and submitted to AADMM.**