

2023  
FEDERAL  
 TAX  
INSTITUTE  
OF NEW  
ENGLAND

A Premier Event for Tax and  
Estate Planning Professionals

November 2, 2023  
Saint Clements Castle



#CBATaxInstituteNE

## Federal Tax Institute of New England

November 2, 2023

8:00 a.m. - 5:00 p.m.

Saint Clements Castle

1931 Portland-Cobalt Rd, Portland, CT

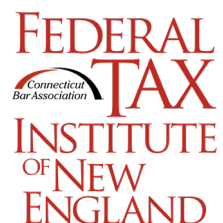
The 2023 Federal Tax Institute of New England will feature national speakers presenting on cutting-edge tax and estate planning issues. Attendees will learn about the future of estate planning, as well as significant tax issues faced by businesses today. Practitioners of all levels and in a wide variety of practice settings will find relevant content and training at this program.

This event is a unique opportunity for your business to gain exposure to the region's top probate, trust, estate, federal income, and gift tax attorneys at this full-day education program.

Event highlights include:

- **More than 125 attendees**
- **Luncheon**
- **Exceptional networking opportunities**

A Premier Event for Tax and Estate Planning Professionals  
Proudly Presented by the Connecticut Bar Association  
Estates and Probate and Tax Sections



## Sponsorship Opportunities

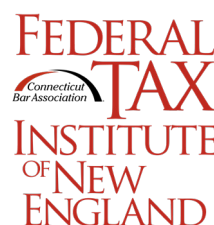
	Break Sponsor	Seminar Sponsor	Networking Breakfast Sponsor	Luncheon Sponsor
Logo and Description in Event App	.	.	.	.
Logo on CBA Event Website and Signage	.	Seminar specific	.	.
Acknowledgement During Luncheon Presentation	.	.	.	.
Logo on Event Marketing Emails		Seminar specific	.	.
Mention in CBA Social Media Posts		1	2	3
Luncheon Ticket(s)			1	2
Prominent Exhibitor Space			.	.
Banner Ad and One Push Notification in Event App			.	.
Full Page Slideshow Ad		Seminar specific		.
<b>Sponsorship Price</b>	<b>\$650</b>	<b>\$1,000</b>	<b>\$2,000</b>	<b>\$3,500</b>

## Exhibitor Opportunities

	Basic Exhibitor	Premium Exhibitor
One 72" x 30" Draped and Skirted Table and up to Two Chairs	.	.
Company Listed on CBA Event Website	Name	Logo
Company description in the event app	.	.
Prominent Exhibitor Space		.
Banner Ad and One Push Notification in Event App		.
<b>Exhibitor Price</b>	<b>\$650</b>	<b>\$1,000</b>

## Advertising Add-Ons

Ad Size	Ad Price
One Push Notification in Event App	<b>\$150</b>
Banner Ad 1,200px x 200px	<b>\$100</b>



Please read all of the following information. Signing the Sponsor/Exhibitor Agreement Form indicates that you have read and agree to all the terms outlined below.

## **General Sponsor and Exhibitor Information**

- The Connecticut Bar Association will assign all exhibitor spaces.
- Exhibiting companies requiring items not included in the two available exhibitor packages will incur additional expenses as outlined on the Sponsor/Exhibitor Agreement Form.
- Each exhibit space will include a 72" x 30" draped and skirted table and up to two chairs. Exhibits requiring more than two chairs will require the purchase of an additional table.
- Exhibit set up must be completed by 7:45 a.m. on November 2. Please note: breakfast with exhibitors will begin promptly at 8:00 a.m., and this is prime time for attendees to mingle with vendors.
- Exhibit breakdown must be completed by 3:30 p.m. on November 2 to allow staff to prepare for evening activities.
- Venue personnel are not permitted to assist in the setting up or dismantling of exhibits. The exhibitor must make arrangements for both.
- Please be aware that as an exhibitor and a sponsor that you do not have access to the conference seminars. If you would like to attend the conference seminars you must register for the conference.

## **Shipping Instructions**

All deliveries must arrive at Saint Clements Castle on Wednesday, November 1, 2023.  
(No prior deliveries will be accepted.)

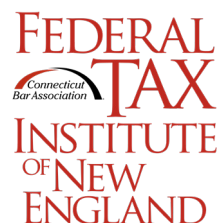
Attention: (Name of person who is picking up the package)  
Saint Clements Castle  
c/o Pam Marshall  
Federal Tax Institute of NE/CBA  
1931 Portland-Cobalt Rd  
Portland, CT 06480

## **Liability**

Saint Clements Castle and the Connecticut Bar Association will not be responsible for any loss, damage, or injury that may occur to the exhibitor, the exhibitor's employees, or property from any cause whatsoever prior to, during, or subsequent to the period covered by the Sponsor/Exhibitor Agreement. Upon signing the Agreement Form, the exhibitor expressly releases Saint Clements Castle and the Connecticut Bar Association from, and agrees to indemnify same against, any and all claims for such loss, damage, or injury.

## **Electrical and Secure Wireless Internet Connection**

If your exhibit requires electrical service of any kind, you must indicate this on the Sponsor/Exhibitor Agreement Form. Each 5-amp outlet is \$25. A secure wireless Internet connection is available.



## Luncheon Tickets

Tickets to the event luncheon are not included in your purchase unless otherwise noted. Luncheon tickets can be purchased for \$49 on the Sponsor/Exhibitor Agreement Form.

## Attendee Privacy

The CBA will not provide a contact list of all of the event attendees or a contact list of the event attendees who attended sponsored seminars or plenaries. The CBA will provide a list of attendees who visit your sponsor/exhibitor listing in the event app.

## Sponsorship Exclusivity

Sponsorship opportunities are not exclusive and the CBA has the right to sell an opportunity to more than one organization. If you are interested in an exclusive opportunity, please email [sponsorship@ctbar.org](mailto:sponsorship@ctbar.org).

## Refunds

Refunds will not be provided after Monday, October 2, 2023.

## Due by October 2, 2023

- **Advertising Artwork**

All ads must be submitted. Submit color files to [sponsorship@ctbar.org](mailto:sponsorship@ctbar.org). Please review ad dimensions before designing and submitting artwork.

- **Push Notification Text**

Please provide the text for push notification included in your package or advertisement add-on. If you do not provide text, the notification will be drafted by the CBA. The title of the notification is limited to 50 characters. The body of the notification can include text, links, and images. The notification is subject to review by the CBA.

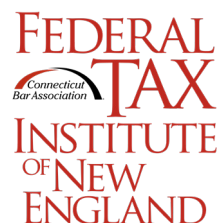
- **Company Description**

Please e-mail a 50-word description to [sponsorship@ctbar.org](mailto:sponsorship@ctbar.org) to include in the event app. (It is not necessary to submit a description if you are only purchasing an advertisement.)

- **Giveaway and Prize Information (if applicable)**

If providing a giveaway or prize, contact [sponsorship@ctbar.org](mailto:sponsorship@ctbar.org) or call (860) 223-4400 to finalize prize and entry information.

**Please contact us at (860) 223-4400  
or [sponsorship@ctbar.org](mailto:sponsorship@ctbar.org) with questions.**



# Sponsor/Exhibitor Agreement Form

**Company Profile Information** This information will appear in the sponsor and/or exhibitor profile sections of event materials.

**Company Representative:** \_\_\_\_\_

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

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

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_

**Phone:** \_\_\_\_\_ **E-mail:** \_\_\_\_\_

**Website:** \_\_\_\_\_

**Company Description:** Please e-mail a 50-word description to [sponsorship@ctbar.org](mailto:sponsorship@ctbar.org) by October 2, 2023 to include in the event app. (It is not necessary to submit a description if you are only purchasing an advertisement.)

**Authorized Signature** I have read and agree to comply with all terms of my sponsorship/exhibiting/advertising agreement.

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

**Sponsorship, Exhibitor, Advertising Opportunities** (Please indicate your selection below.)

**Sponsorship:** ☐ \$650 Break Sponsor ☐ \$1,000 Seminar Sponsor  
☐ \$2,000 Networking Breakfast Sponsor ☐ \$3,500 Luncheon Sponsor

**Exhibitor:** ☐ \$650 Basic Exhibitor ☐ \$1,000 Premium Exhibitor

**Advertising Add Ons:** ☐ \$150 One Push Notification ☐ \$100 Banner Ad

**Additional Expenses** ☐ 5-amp Outlet # of Outlets \_\_\_\_ x \$25 = \_\_\_\_  
☐ Ticket(s) to the Luncheon (Not already included in your package) # of Ticket(s) \_\_\_\_ x \$49 = \_\_\_\_

**Total:** \$ \_\_\_\_\_

**Booth Attendees** If applicable—please print clearly. **Only two people per booth.**

(If you do not yet know who will attend, please e-mail [sponsorship@ctbar.org](mailto:sponsorship@ctbar.org) by October 2, 2023 with the names of those who will attend.)

\_\_\_\_\_  
First Name

\_\_\_\_\_  
Last Name

\_\_\_\_\_  
First Name

\_\_\_\_\_  
Last Name

## Prize Contribution

- ☐ Yes, I will provide a giveaway or prize at the Federal Tax Institute of New England.  
I will contact [sponsorship@ctbar.org](mailto:sponsorship@ctbar.org) or (860) 223-4400 to finalize prize and entry information by October 2, 2023.

## Method of Payment

☐ Check (payable to Connecticut Bar Association) ☐ AMEX ☐ Mastercard ☐ Visa

**Credit Card #:** \_\_\_\_\_ **CVV:** \_\_\_\_\_ **Exp. Date:** \_\_\_\_\_

**Name on Card:** \_\_\_\_\_ **Billing Zip Code:** \_\_\_\_\_

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