

A Premier Event for Tax and Estate Planning Professionals

October 30, 2025 Saint Clements Castle Federal Tax Institute of New England
October 30, 2025
8:00 a.m. - 5:00 p.m.
Saint Clements Castle
1931 Portland-Cobalt Rd, Portland, CT

The 2025 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 full-day education program provides a unique opportunity for your business to gain exposure with the region's top probate, trust, estate, federal income, and gift tax attorneys.

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**

	Luncheon Sponsor	Networking Breakfast Sponsor	Seminar Sponsor	Break 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	3	2	1	
Luncheon Ticket(s)	2	1		
Prominent Exhibitor Space	•	•		
Banner Ad and One Push Notification in Event App	•	•		
Full Page Slideshow Ad	•		Seminar Specific	
Sponsorship Price	\$3,500	\$2,000	\$2,000	\$3,500

# **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		•
Exhibitor Price	\$750	\$1,000

## **Advertising Add-Ons**

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



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 October 30. 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 October 30 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, October 29, 2025. (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 \$59 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.

#### Refunds

Refunds will not be provided after Monday, September 29, 2025.

## Due by September 29, 2025

#### Advertising Artwork

All ads must be submitted. Submit color files to 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 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 or call (860) 223-4400 to finalize prize and entry information.

Please contact us at (860) 223-4400 or sponsorship@ctbar.org with questions.



# **Sponsor/Exhibitor Agreement Form**

Company Profile I	nformation This information will appear in the s	sponsor and/or exhibite	or profile sections of event materials.			
Company Representa	tive:					
Company Name:						
Address:						
City:	Sta	ate:	Zip:			
Phone:	E-r	E-mail:				
Website:						
	: Please e-mail a 50-word description to spor ot necessary to submit a description if you ar		• •			
<b>Authorized Signat</b>	ure I have read and agree to comply with all term	ns of my sponsorship.	/exhibiting/advertising agreement.			
Signature:	Signature: Date: _		e:			
Sponsorship, Exhi	bitor, Advertising Opportunities (Ple	ease indicate your	selection below.)			
Sponsorship:	□ \$650 <u>Break Sponsor</u> □ \$2,000 <u>Networking Breakfast Sponsor</u>	•	minar Sponsor ncheon Sponsor			
Exhibitor:	□ \$750 Basic Exhibitor	□ \$1,000 <u>Pre</u>	emium Exhibitor			
Advertising Add Ons:	□ \$150 One Push Notification	□ \$100 <u>Bann</u>	ner Ad			
Additional Expenses	□ <u>5-amp Outlet</u>	# of	Outlets x \$25 =			
	☐ <u>Ticket(s) to the Luncheon</u> (Not already included	in your package) # of	Ticket(s) x \$59 =			
Total: \$						
	f applicable—please print clearly. Only two people who will attend, please e-mail sponsorship@		mber 29, 2025 with the names of			
First Name	Last Name	First Nar	ne Last Name			
<b>Prize Contribution</b>	1					
	e a giveaway or prize at the Federal Tax Instite onsorship@ctbar.org or (860) 223-4400 to fina					
Method of Paymer (To pay online, click the	nt Inks on the relevant sponsorships, exhibitor	packages, and add	ditions above.)			
☐ Check (payable to C	Connecticut Bar Association) 🗆 AMEX 🗆	Mastercard □ Vi	sa			
Credit Card #:		CVV:	Exp. Date:			
Name on Card:		Billing Zip Code:				
Signature:	ture: Date:					