



2017 SPONSORSHIP OPPORTUNITIES

Fusion Collaboration • Tuesday, July 18th and Wednesday, July 19th, 2017

Rendezvous • Wednesday, July 19th – Friday, July 21st, 2017

Omni Interlocken Hotel & Resort • Broomfield, Colorado

The Purposeful Planning Institute (PPI) is proud to present the 2017 Fusion Collaboration & Rendezvous.

Fusion Collaboration will bring together estate planning, tax and business planning attorneys, CFPs, CLUs, CPAs, planned giving professionals, trustees, wealth managers and other professionals serving legacy families and families in business for an innovative learning and networking opportunity. The first Fusion Collaboration in 2015 attracted 75 professionals. In July 2016, we had 150 professionals attend and in 2017 our goal is to draw between 250 and 300 professionals. This event offers a variety of technical topics and features a highly rated “Collaboration Day”. Most sessions qualify for Continuing Education Credit.

The Rendezvous is a premier event that offers one-of-a-kind learning and networking opportunities for PPI Members and guests. The 2016 Rendezvous brought together nearly 200 individuals representing more than 20 disciplines and professions for two days of collaborative dialogue, keynotes, and breakout sessions centered on best practices for legacy families and families in business. Rendezvous offers open-space inspired learning through interactive peer-facilitated breakout sessions on highly popular topics.

Event sponsorship provides your firm exposure and access to some of the nation’s most prominent thought leaders and industry innovators. PPI is dedicated to creating a Purposeful Planning Revolution that transforms the way estate and financial planning is done and to mastering the principles and practices of client-centered planning. We are looking for “like-minded” and “like-hearted” sponsors who share our commitment to explore and share best practices for legacy families and families in business, to foster more frequent and effective collaboration among the advisors serving these families and to promote prosperous and sustainable practices and the growth of our individual members, their practices and firms.

Sponsorship applications will be carefully reviewed and evaluated to ensure sponsors are a good fit and further the mission and vision of PPI and the Rendezvous. Complete and return this sponsorship application form right away to be considered.

Combo (both **Fusion Collaboration** and **Rendezvous**) sponsors will always receive preferential placement and messaging priority and a discount on sponsorship fees: **Silver Combo (\$3,500)**; **Gold Combo (\$7,500)**; and **Platinum Combo (\$10,000)**. Combo sponsors will have the opportunity to connect with more professionals over the full course of the events and will have more time to create deeper connections.

If you have questions or would like to create your own custom sponsorship package, contact us at 720-458-7777 or info@purposefulplanninginstitute.com.

Platinum Sponsor

Combo \$10,000 | Rendezvous \$6,500 | Fusion Collaboration \$6,500

- Listing as Platinum Level Sponsor with company logo, description and hyperlink on event website(s)
- Listing as Platinum Level Sponsor in event brochure(s) and on-site signage
- Announcement of Platinum Level Sponsorship on PPI LinkedIn Group (almost 3,000 members)
- **Dedicated pre/post event email broadcast to PPI members and event attendees, allowing you to share information about your company/products and/or invite registrants to stop by your table at the event (restrictions apply)**
- Opportunity to host an informational table **in a prime location** (6-foot table)
- **Opportunity to host a roundtable discussion / affinity table over breakfast and/or lunch (2 opportunities for combo sponsors)**
- Opportunity to host two (2) dinner groups with up to ten guests at each event you are sponsoring
- Announcement as Platinum Sponsor during opening remarks
- **Opportunity to give a 2-3 minute overview of your company during opening remarks**
- **Corporate Group Membership (one-year membership for three individuals - \$1,800 value)**
- **Three (3) complimentary event registrations for each event that you are sponsoring**
- **Opportunity to purchase up to five additional event registrations at 50% off published price at each event you are sponsoring**
- Badge ribbon identifying your firm representatives as PPI Sponsors
- **Opportunity to host two foursomes at Omni's 27-hole championship golf course on Friday afternoon (Rendezvous and combo sponsors only)**

Gold Sponsor

Combo \$7,500 | Rendezvous \$4,500 | Fusion Collaboration \$4,500

- Listing as Gold Level Sponsor with company logo, description and hyperlink on event website(s)
- Listing as Gold Level Sponsor in event brochure(s) and on-site signage
- Announcement of Gold Level Sponsorship on PPI LinkedIn Group (almost 3,000 members)
- **Inclusion in pre/post event email broadcast to event attendees, allowing you to share information about your company/products and/or invite registrants to stop by your table at the event (restrictions apply)**
- Opportunity to host an informational table (6-foot table)
- **Opportunity to host a roundtable discussion / affinity table over breakfast and/or lunch (2 opportunities for combo sponsors)**
- Opportunity to host a dinner group with up to six guests at each event you are sponsoring
- Announcement as Gold Sponsor during opening remarks
- **One (1) PPI Individual Premium Membership (one-year membership - \$600 value)**
- One (1) complimentary event registration for each event you are sponsoring
- **Opportunity to purchase up to three additional event registrations at 50% off published price at each event you are sponsoring**
- Badge ribbon identifying your firm representatives as PPI Sponsors

Silver Sponsor

Combo \$3,500 | Rendezvous \$2,500 | Fusion Collaboration \$2,500

- Listing as Silver Level Sponsor with company logo, description and hyperlink on event website(s)
- Listing as Silver Level Sponsor in event brochure(s) and on-site signage
- Announcement of Sponsorship on PPI LinkedIn Group (almost 3,000 members)
- Opportunity to host a sponsorship table (3-foot table)
- Announcement as Silver Sponsor during opening remarks
- Opportunity to host a dinner group with up to four guests at each event you are sponsoring
- One (1) complimentary event registration for each event you are sponsoring
- Badge ribbon identifying your firm representatives as PPI Sponsors



**2017 FUSION COLLABORATION & RENDEZVOUS
SPONSORSHIP COMMITMENT FORM**

Yes! We are committing to be a sponsor at the level indicated below:

- | | | |
|---|---|---|
| <input type="checkbox"/> Combo Platinum (\$10,000) | <input type="checkbox"/> Combo Gold (\$7,500) | <input type="checkbox"/> Combo Silver (\$3,500) |
| <input type="checkbox"/> Rendezvous Platinum (\$6,500) | <input type="checkbox"/> Rendezvous Gold (\$4,500) | <input type="checkbox"/> Rendezvous Silver (\$2,500) |
| <input type="checkbox"/> Fusion Platinum (\$6,500) | <input type="checkbox"/> Fusion Gold (\$4,500) | <input type="checkbox"/> Fusion Silver (\$2,500) |

Note: 50% of sponsorship fee is due at time of commitment. Balance must be paid no later than **June 30, 2017**. Please return this application by fax to 866-611-6926 or via email to info@purposefulplanninginstitute.com

Customized Sponsorship and Strategic Partnership Opportunities:

- Rendezvous Gala Dinner Sponsorship** – Signage at the opening dinner lunch buffet & opportunity to provide marketing materials on tables (\$15,000)
- Video Recording Package** – Acknowledgement & logo included in all videos (\$15,000)
- Strategic Sponsorship** - We are interested in learning more about the multi-year Strategic Partnership opportunities which would allow us to be an event sponsor at both the Fusion Collaboration and the Rendezvous but to also benefit from connections and targeted marketing messages with the Purposeful Planning Institute community throughout the year. Strategic Partnership opportunities are typically for two years or longer.
- We are interested in learning more about the **Corporate and Group Membership** program. The more professionals from your organization or firm take advantage of membership the greater the savings. Corporate and Group Membership packages start with a minimum of three individuals and a twenty-five percent (25%) savings over the cost of individual membership.

Company Name

Signature of Authorized Company Official or Representative Date

Contact Name – Phone Number and Email Address

Address

City/State/Zip