



## **SPONSORSHIP OPPORTUNITIES**

2020 Rendezvous & Fusion  
Tuesday, July 21<sup>st</sup> – Thursday, July 23<sup>rd</sup>, 2020  
Four Seasons Downtown Denver

The Purposeful Planning Institute (PPI) is proud to present the 2020 Rendezvous & Fusion.

Rendezvous is the premier event offering one-of-a-kind learning and networking opportunities for PPI Members and guests. This event will bring together 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.

The Fusion track will offer a variety of technical topics and sessions that qualify for Continuing Education Credit. This is the place for estate planning, tax and business planning attorneys, CFPs, CLUs, CPAs, planned giving professionals, trustees, wealth managers and other professionals who would like to stay current with technical topics while gaining exposure to the latest trends in Purposeful Planning.

Event sponsorship provides your firm exposure and access to advisors and consultants who serve HNW and UHNW families. The attendees at PPI gatherings are early adopters, highly collaborative, and dedicated to best practices and impeccable service. 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. Complete and return this sponsorship application form right away to be considered.

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

Sincerely,

**John "John A" Warnick**

***Counselor and Attorney at Law***

Founder of the **Purposeful Planning Institute** and Initiator of the **Seven Keys of Purposeful Trusts** and the **Six Paradigms of Purposeful Planning**

## Platinum Sponsor

\$11,250 (\$10,250 by December 15th)

- Listing as Platinum Level Sponsor with company logo and link on event website(s)
- Listing as Platinum Level Sponsor in event brochure and on-site signage
- Announcement of Platinum Level Sponsorship on PPI LinkedIn Group (almost 3,000 members)
- **Dedicated pre-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**
- Opportunity to host two (2) dinner groups with up to ten guests at each
- **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 (\$5,850 value)**
- **Opportunity to purchase up to five additional event registrations at 50% off published price (\$4,875 value)**
- Badge ribbon identifying your firm representatives as PPI Sponsors
- **PLATINUM KEYNOTE SPONSOR OPTION: ADD \$5,000**
- **VIDEO RECORDING PACKAGE SPONSOR OPTION: ADD \$5,000 (\$2,500 SAVINGS)**

## Gold Sponsor

\$8,500 (\$7,500 by December 15th)

- Listing as Gold Level Sponsor with company logo and hyperlink on event website(s)
- Listing as Gold Level Sponsor in event brochure and on-site signage
- Announcement of Gold Level Sponsorship on PPI LinkedIn Group (almost 3,000 members)
- **Inclusion in pre-event email broadcast to event attendees recognizing all sponsors**
- Opportunity to host an informational table (6-foot table)
- **Opportunity to host a roundtable discussion / affinity table over breakfast and/or lunch**
- Opportunity to host a dinner group with up to six guests
- Announcement as Gold Sponsor during opening remarks
- **One (1) PPI Individual Premium Membership (one-year membership - \$600 value)**
- One (1) complimentary event registration (\$1,950 value)
- **Opportunity to purchase up to three additional event registrations at 50% off published price (\$2,925 value)**
- Badge ribbon identifying your firm representatives as PPI Sponsors

## Silver Sponsor

\$4,250 (\$3,500 by December 15th)

- Listing as Silver Level Sponsor with company logo and hyperlink on event website(s)
- Listing as Silver Level Sponsor in event brochure and on-site signage
- Announcement of Sponsorship on PPI LinkedIn Group (almost 3,000 members)
- Inclusion in pre-event email broadcast to event attendees recognizing all sponsors
- Opportunity to host an informational table (table size 3 – 6 ft, depending on space availability)
- Announcement as Silver Sponsor during opening remarks
- Opportunity to host a dinner group with up to four guests
- One (1) complimentary event registration (\$1,950 value)
- Badge ribbon identifying your firm representatives as PPI Sponsors



## 2020 RENDEZVOUS & FUSION SPONSORSHIP COMMITMENT FORM

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

- Platinum** (\$11,250 / \$10,250 by 12/15)
- Platinum + Keynote** (\$16,250 / \$15,250 by 12/15)
- Platinum + Video Recording Package** (\$16,250 / \$15,250 by 12/15)
- Gold** (\$8,500 / \$7,500 by 12/15)
- Silver** (\$4,250 / \$3,500 by 12/15)

Note: Balance must be paid no later than **June 30, 2019**. Please return this application by fax to 866-611-6926 or via email to [info@purposefulplanninginstitute.com](mailto:info@purposefulplanninginstitute.com)

### Customized Sponsorship and Strategic Partnership Opportunities:

- 10<sup>th</sup> Anniversary Gala Dinner Sponsorship** – This is the high point of the entire three day gathering and offers your company maximum exposure. We'll provide signage at the opening dinner buffet & opportunity to provide marketing materials on tables as well as make a short (2-3 minute) introduction of your firm to the dinner attendees (\$15,000)
- Video Recording Package** – Short promotional trailer & logo included in all conference videos (\$7,500)
- 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 Rendezvous & Fusion 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.

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Company Name

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Signature of Authorized Company Official or Representative

Date

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Contact Name – Phone Number and Email Address

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Address

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City/State/Zip