



SPONSORSHIP OPPORTUNITIES

2021 RendeZoom
Wednesday, July 21st – Friday, July 23rd
Live Virtual Summit

The Purposeful Planning Institute (PPI) is proud to present the 2021 RendeZoom. Rendezvous is still *the* premier event offering one-of-a-kind learning and networking opportunities for PPI Members and guests. The 2021 Virtual Rendezvous & Fusion (aka RendeZoom) will bring together individuals representing more than 20 disciplines and professions for two and a half days of collaborative dialogue, keynotes, and breakout sessions centered on best practices for legacy families and families in business. RendeZoom offers open-space inspired learning through interactive peer-facilitated breakout sessions on highly popular topics as well as dynamic and impactful keynotes and plenary sessions. Plus, we are making RendeZoom an incredible experience, full of fun, warmth, and meaningful dialogues with colleagues and sponsors.

RendeZoom's intentionally designed interactive breakouts offer access to leading practitioners and industry innovators. RendeZoom will showcase best practices across a wide spectrum of issues which challenges HNW and UHNW families.

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 help our members and guests create prosperous and sustainable 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.

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

- Listing as Platinum Level Sponsor with company logo and link on event website(s)
- Listing as Platinum Level Sponsor in the mobile event app and digital event platform
- Announcement of Platinum Level Sponsorship on PPI LinkedIn Group (over 3,000 members)
- **Dedicated pre-event email broadcast to PPI members and event attendees, allowing you to share information about your company/products (restrictions apply)**
- Recognition as sponsor on session recordings
- Opportunity to host a roundtable discussion / affinity table during Rendez-Café
- Opportunity to host a virtual group networking experience during Rendez-Lounge
- Prominent logo placement throughout the virtual event platform, plus early access to the platform to upload content and materials to your dedicated sponsor page
- **Corporate Group Membership (one-year membership for three individuals - \$1,350 value)**
- **Three (3) complimentary event registrations (\$2,685 value)**
- **Opportunity to purchase up to five additional event registrations at 50% off published price (\$2,237.50 value)**
- Badge identifying your firm representatives as PPI Sponsors
- **PLATINUM KEYNOTE SPONSOR OPTION: ADD \$5,000**

Gold Sponsor | \$8,500

- Listing as Gold Level Sponsor with company logo and hyperlink on event website(s)
- Listing as Gold Level Sponsor in the mobile event app and digital event platform
- Announcement of Gold Level Sponsorship on PPI LinkedIn Group (over 3,000 members)
- **Inclusion in pre-event email broadcast to event attendees recognizing all sponsors**
- Recognition as sponsor on session recordings
- Opportunity to host a roundtable discussion / affinity table during Rendez-Café
- Opportunity to host a virtual group networking experience during Rendez-Lounge
- Early access to the platform to upload content and materials to your dedicated sponsor page
- **One (1) PPI Individual Premium Membership (one-year membership - \$600 value)**
- One (1) complimentary event registration (\$895 value)
- **Opportunity to purchase up to three additional event registrations at 50% off published price (\$1,342.50 value)**
- Badge identifying your firm representatives as PPI Sponsors

Silver Sponsor | \$4,250

- Listing as Silver Level Sponsor with company logo and hyperlink on event website(s)
- Listing as Silver Level Sponsor in the mobile event app and digital event platform
- Announcement of Sponsorship on PPI LinkedIn Group (over 3,000 members)
- Inclusion in pre-event email broadcast to event attendees recognizing all sponsors
- Recognition as sponsor on session recordings
- Opportunity to host a roundtable discussion / affinity table during Rendez-Café
- Opportunity to host a virtual group networking experience during Rendez-Lounge
- Early access to the virtual event platform to upload content and materials to your dedicated sponsor page
- One (1) complimentary event registration (\$895 value)
- Badge identifying your firm representatives as PPI Sponsors



**2021 RENDEZOOM
SPONSORSHIP COMMITMENT FORM**

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

- Platinum** (\$11,250)
- Platinum + Keynote** (\$16,250)
- Gold** (\$8,500)
- Silver** (\$4,250)

Note: Balance must be paid no later than **June 30, 2021**. Please return this application by fax to 866-611-6926 or via email to info@purposefulplanninginstitute.com

Customized Sponsorship and Strategic Partnership Opportunities:

- 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.

Company Name

Signature of Authorized Company Official or Representative

Date

Contact Name – Phone Number and Email Address

Address

City/State/Zip