



## SPONSORSHIP OPPORTUNITIES

10<sup>th</sup> Annual In-Person Rendezvous  
Monday, July 18th – Thursday, July 21st, 2022  
Four Seasons Downtown Denver

The Purposeful Planning Institute (PPI) is proud to present the 2022 Rendezvous.

The 2022 Rendezvous will take place at the Four Seasons Downtown Denver on July 18<sup>th</sup> – 21<sup>st</sup>. 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 and a half 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.

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**

# 2022 Purposeful Planning Institute Sponsorship Opportunities

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## Platinum Event Sponsor | \$11,250

### 2022 Rendezvous

- 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
- 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
- Three (3) complimentary event registrations
- Opportunity to purchase up to five additional event registrations at 50% off published price
- Badge ribbon identifying your firm representatives as PPI Sponsors
- Corporate Group Membership (one-year membership for three individuals)
- Announcement of Platinum Level Annual Sponsorship on PPI LinkedIn Group (over 4,000 members)

## Gold Event Sponsor | \$8,500

### 2022 Rendezvous

- Listing as Gold Level Sponsor with company logo and link on event website(s)
- Listing as Gold Level Sponsor in event brochure and on-site signage
- 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) complimentary event registration
- Opportunity to purchase up to three additional event registrations at 50% off published price
- Badge ribbon identifying your firm representatives as PPI Sponsors
- Announcement of Gold Level Sponsorship on PPI LinkedIn Group (over 4,000 members)
- One (1) PPI Individual Premium Membership (one-year membership)

## Silver Event Sponsor | \$4,250

### 2022 Rendezvous

- Listing as Silver Level Sponsor with company logo and link on event website(s)
- Listing as Silver Level Sponsor in event brochure and on-site signage
- 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
- Badge ribbon identifying your firm representatives as PPI Sponsors
- Announcement of Sponsorship on PPI LinkedIn Group (almost 3,000 members)

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## 2022 SPONSORSHIP COMMITMENT FORM

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

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

Note: Balance must be paid no later than **January 30<sup>th</sup> 2022**. 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 (\$12,500)
- 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

# 2022 Purposeful Planning Institute Sponsorship Opportunities

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## Solicitation Guidelines & Code of Conduct for PPI Sponsors

The Purposeful Planning Institute relies on the generous support of sponsors and strategic partners to achieve our vision of creating a Purposeful Planning Revolution that transforms the way estate and financial planning is done. Aligning yourself with the Purposeful Planning Institute demonstrates that you're an industry leader and committed to mastering and promoting the principles and practices of client-centered planning.

By becoming a sponsor, you are supporting the Purposeful Planning Institute and its mission 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.

It is key to our success to have strategic sponsors who align with our purpose and mission and who in turn will benefit from deeper connections with PPI's membership.

For these reasons, we have developed the following Solicitation Guidelines & Code of Conduct for PPI Sponsors that we ask you to become familiar with. Our goal is to create a safe environment for professional advisors and consultants, family office professionals, and client families that promotes collaboration, openness and sharing. Hard selling is strictly prohibited within the PPI community.

- As outlined in our Sponsorship Opportunities, Platinum level sponsors are permitted to send a dedicated pre and post event email broadcast to PPI members and event attendees, sharing information about their company/products and/or to invite registrants to stop by their information table at the event. Gold level sponsors will be included in a group email broadcast, announcing all Gold level sponsors. This broadcast may contain information about the company/products and/or invite registrants to stop by their informational table at the event. All communications from sponsors to PPI members and event attendees will undergo an editorial review process by the Purposeful Planning Institute and will be sent by PPI on behalf of the sponsor.
- PPI will not distribute attendee contact information to sponsors. Sponsors ARE STRICTLY PROHIBITED from using participant lists (and access to Guidebook, the Connecting Point, etc.) for the purposes of direct marketing or solicitation.
- Sponsors are welcome to collect business cards and contact information from event attendees and if that information is given freely sponsors are welcome to follow-up with those individuals and firms to invite them to join the Sponsor's mailing list. Sponsors may offer prizes or special incentives at their booths as a means of collecting business cards. Please note, Canada's Anti-Spam Legislation has strict guidelines around implied consent (giving a business card) and express consent which apply to any Canadian PPI member or event attendee you make contact with, even though that contact occurs in the U.S. Please be sure you are following all national and international anti-spam regulations.
- All attendees (including sponsors) are asked to only present a business card when asked for one. If you ask another participant for their card, if there is interest in forging a deeper relationship, the other individual will almost always offer you their business card or contact information and request yours in return.

Failure to adhere to PPI's Solicitation Policy and Code of Conduct may result in the forfeiture of PPI membership and/or being prohibited from attending future PPI events such as the Purposeful Planning Symposium and Rendezvous.