



# 2024 SPONSORSHIP OPPORTUNITIES

# GET TO KNOW PPI

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The Purposeful Planning Institute (PPI) is a learning center for advisors, consultants, family members and family office professionals and a platform for networking and collaboration. Our members are financial advisors, estate planning attorneys, trust officers, wealth managers, philanthropic consultants, family members and other professionals and consultants serving HNW & UHNW families and families in business.

We understand that non-financial or qualitative factors determine a family's long-term success or failure, and we recognize that providing families with the guidance and tools to enhance their non-financial wealth is a significant opportunity and challenge.

PPI aims to provide resources, tools, and a community of experts to help evaluate a family's non-financial wealth and develop concrete action plans to support their families and family enterprises in areas such as rising gen learning and development, transitioning leadership, governance, intergenerational communication, philanthropy and more.

Most of our members are senior practitioners with decades of experience. Our members have helped families and family enterprises around the world invest in and grow all dimensions of their wealth. They are pioneering the innovative practices that are defining the path to family flourishing.

## Our Members

### *Top Membership Levels*

CFPs, Family Wealth Advisors & Trustees	23%
Family Business Consultants & Coaches	17%
Estate Planning Attorneys & Tax Professionals	14%
Philanthropy Professionals & Consultants	8%
Family Office Professionals & Consultants	6%
Legacy Planners & Consultants	5%
Ten+ Other Disciplines Serving HNW & UHNW Families	27%

## PPI By The Numbers

### *At-a-Glance*

500+	Active Members
5,000+	Contacts on PPI Mailing List
1,688+	Followers on PPI LinkedIn Business Page
10,000+	Members on Various PPI LinkedIn Groups
✓	Early Adopters
✓	Highly Collaborative
✓	Gatekeepers to HNW & UHNW Families

# RENDEZVOUS

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*July 30th - August 1, 2024* | Westminster, Colorado

Rendezvous is the premier event offering one-of-a-kind learning and networking opportunities for PPI Members and guests. This event will bring together approximately 250 individuals representing more than 20 disciplines and professions for in-person 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.

This year, we will be capping the attendance at Rendezvous to ensure the highest quality participation in our events. Last year we sold out and closed registration on June 1st. Secure a spot for you and your team by confirming your sponsorship today!



# PURPOSEFUL PLANNING SYMPOSIUM

*February 7th - 9th, 2024* | Virtual Event

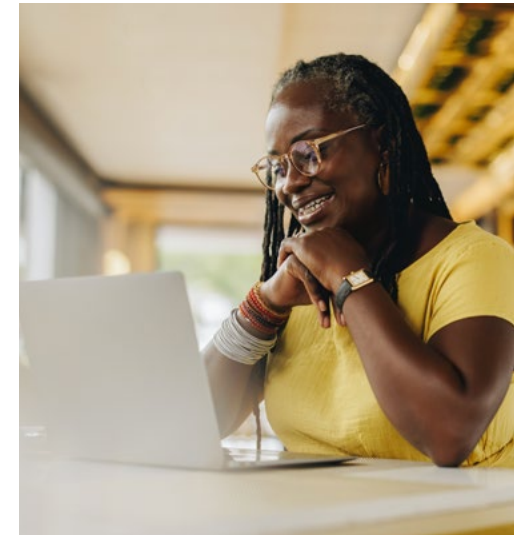
The Purposeful Planning Symposium is a cutting-edge virtual event designed for estate planning attorneys, financial planners and advisors, and other professionals and consultants who want to help clients create more meaningful, more positive, and more sustainable plans. This event will bring together nationally renowned faculty for unique and engaging educational and professional development opportunities that will showcase the benefits of infusing best practices from the domains of relational, philanthropic, and legacy planning into the technical aspects of estate planning and wealth management. The Purposeful Planning Symposium will be delivered through an interactive virtual format that can be enjoyed in the comfort and safety of your home or office, while providing opportunities to connect and engage with professionals from across the country and around the world.

Sponsors who commit by December 15th will gain maximum exposure and will be included as a sponsor of both events at no additional cost!

Being a sponsor provides your firm exposure and access to a very targeted demographic. Our members are predominantly senior practitioners with decades of experience, and they are pioneering many of the innovative practices that are redefining how advisors and consultants work with families of wealth. Plus, we are successfully attracting a new generation of young advisors, who are early adopters, highly collaborative, and dedicated to best practices and impeccable service.

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).





# PLATINUM EVENT SPONSOR



*Platinum \$12,500* (\$11,500 by 12/15/2023)

## 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 email broadcast to event attendees, allowing you to share information about your company/products (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 the Gala Dinner
- 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 sponsors

## PURPOSEFUL PLANNING SYMPOSIUM

- Listing as Platinum Level Sponsor with company logo and link on event website(s)
- Dedicated email broadcast to event attendees, allowing you to share information about your company/products (restrictions apply)
- Opportunity to host a virtual roundtable discussion
- Opportunity to give a 2-3 minute overview of your company during opening remarks
- Listing on sponsor slide with company logo during opening of keynote
- Three (3) complimentary event registrations
- Opportunity to purchase up to five additional event registrations at 50% off published price

## GENERAL

- Corporate Group Membership (one-year membership for three individuals - \$2,250 value)
- Announcement of Platinum Level Sponsorship on PPI LinkedIn Group & Business Page (over 4,000 members)

# GOLD EVENT SPONSOR

*Gold \$9,750* (\$8,750 by 12/15/2023)



## 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 the Gala Dinner
- 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 sponsors

## PURPOSEFUL PLANNING SYMPOSIUM

- Listing as Gold Level Sponsor with company logo and link on event website(s)
- Inclusion in email broadcast to event attendees recognizing all sponsors
- Opportunity to host a virtual roundtable discussion
- Announcement as Gold Sponsor during opening remarks
- Listing on sponsor slides with company logo during opening of keynote
- One (1) complimentary event registration
- Opportunity to purchase up to three additional event registrations at 50% off published price

## GENERAL

- Announcement of Gold Level Sponsorship on PPI LinkedIn Group & Business Page (over 4,000 members)
- One (1) PPI Individual Premium Membership (one-year membership - \$750 value)

# SILVER EVENT SPONSOR

*Silver \$5,500 (\$4,500 by 12/15/2023)*



## 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 email broadcast to event attendees recognizing all sponsors
- Opportunity to host an informational table (6-foot table)
- Announcement as Silver Sponsor during the Gala Dinner
- Opportunity to host a dinner group with up to four guests
- One (1) complimentary event registration
- Badge ribbon identifying your firm representatives as sponsors

## PURPOSEFUL PLANNING SYMPOSIUM

- Listing as Silver Level Sponsor with company logo and link on event website(s)
- Announcement as Silver Sponsor during opening remarks
- Listing on sponsor slides with company logo during opening of keynote
- One (1) complimentary event registration
- Badge ribbon identifying your firm representatives as PPI Sponsors

## GENERAL

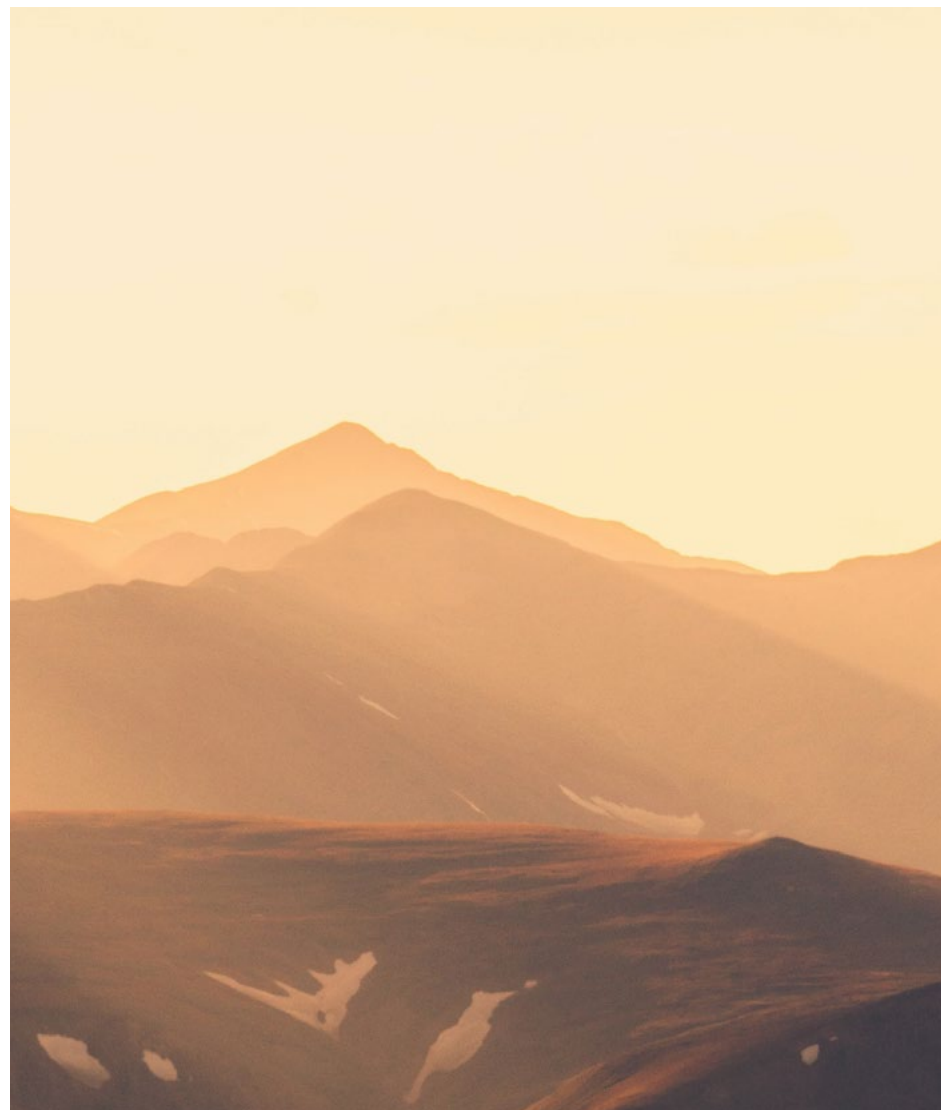
- Announcement of Sponsorship on PPI LinkedIn Group & Business Page (over 4,000 members)

# BRONZE EVENT SPONSOR *(for Individual Practitioners and Consultants)*



*Bronze \$4,000 (\$3,500 by 12/15/2023)*

- Listing as Bronze Level Sponsor with company logo and link on event website(s)
- Opportunity to host a dinner group with up to four guests at Rendezvous
- Opportunity to host a roundtable discussion at Rendezvous (and/or virtual roundtable at the Purposeful Planning Symposium)
- One (1) complimentary registration for Rendezvous & the Purposeful Planning Symposium
- One (1) PPI Individual Premium Membership (one-year membership)





# 2023 SPONSORSHIP COMMITMENT FORM

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

☐ **Platinum** \$12,500 (\$11,500 by 12/15/2023)

☐ **Silver** \$5,500 (\$4,500 by 12/15/2023)

☐ **Gold** \$9,750 (\$8,750 by 12/15/2023)

☐ **Bronze\*** \$4,000 (\$3,500 by 12/15/2023)

*\*Reserved for Individual Practitioners & Consultants*

## ADD-ONS, CUSTOMIZED SPONSORSHIP, AND STRATEGIC PARTNERSHIP OPPORTUNITIES:

- ☐ **Rendezvous Gala Dinner** – This is the high point of Rendezvous 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 (\$13,500)
- ☐ **Rendezvous Keynote Speaker** – Sponsor our Rendezvous Keynote Speaker and we'll include your logo on keynote focused marketing, in opening keynote presentation slides, and you'll have the opportunity to introduce our keynote speaker (\$10,500)
- ☐ **Video Recording Package** – Logo and sponsorship recognition included in all conference videos (\$7,500)

*Company Name*

*Signature of Authorized Company Official or Representative*

*Date*

*Contact Name*

*Contact Phone*

*Contact Email*

*Address*

*City/State/Zip*

**Note:** Balance must be paid no later than December 15, 2023 for discounted sponsorship opportunities. Standard rate sponsorship balances are due by **June 1st, 2024**. Please return this application by fax to 866-611-6926 or via email to [info@purposefulplanninginstitute.com](mailto:info@purposefulplanninginstitute.com).

# SOLICITATION GUIDELINES & CODE OF CONDUCT FOR PPI SPONSORS

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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 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 and Silver level sponsors will be included in a group email broadcast, announcing all sponsors. The dedicated email 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 event mobile app, 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.