



2019 SPONSORSHIP OPPORTUNITIES

Fusion Collaboration & Rendezvous
Tuesday, July 23rd – Thursday, July 25th, 2019
Embassy Suites Downtown Denver

The Purposeful Planning Institute (PPI) is proud to present the 2019 Fusion Collaboration & Rendezvous.

In response to overwhelming feedback from attendees and sponsors, we've made some pretty significant changes for 2019. In PPI's best spirit of innovation, we are combining Fusion Collaboration and Rendezvous. In the recent past, these two unique yet complimentary events have been held back-to-back and many opted to attend both. Now in 2019, a Fusion Collaboration (CLE/CPE) track will be offered at Rendezvous and the entire event will be shortened from 4 days to 3 days. This will give sponsors the opportunity to reach even more participants as we anticipate combining the two events will result in higher attendance over the full three days of programming.

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 Collaboration 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.

The combination of Fusion Collaboration & Rendezvous offers our attendees the best of both worlds. If they need or want CPE/CLE credits they can get that through the great programming offered in the Fusion Collaboration track. If an advisor or consultant wants to dive into best practices for legacy families and families in business, they can participate in any of the Rendezvous programming. It's a win-win and the only conference of this kind in the entire professional world.

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.

Email: info@purposefulplanninginstitute.com • Website: www.purposefulplanninginstitute.com

Platinum Sponsor (Limit 1)

\$10,000 (\$9,000 by December 15th)

- Listing as Platinum Level Sponsor with company logo and hyperlink 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 (\$5,475 value)**
- **Opportunity to purchase up to five additional event registrations at 50% off published price (\$4,562 value)**
- Badge ribbon identifying your firm representatives as PPI Sponsors

Gold Sponsor

\$7,500 (\$6,500 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, 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**
- 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 (\$1,825 value)
- **Opportunity to purchase up to three additional event registrations at 50% off published price (\$2,737 value)**
- Badge ribbon identifying your firm representatives as PPI Sponsors

Silver Sponsor

\$3,750 (\$3,000 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)
- 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 (\$1,825 value)
- Badge ribbon identifying your firm representatives as PPI Sponsors



**2018 FUSION COLLABORATION & RENDEZVOUS
SPONSORSHIP COMMITMENT FORM**

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

- Platinum** (\$10,000 / \$9,000 by 12/15)
- Gold** (\$7,500 / \$6,500 by 12/15)
- Silver** (\$3,750 / \$3,000 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

Customized Sponsorship and Strategic Partnership Opportunities:

- Rendezvous 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** – Acknowledgement & logo included in all conference videos (\$10,000)
- 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