

# Sponsorship Opportunities

## Tools + Tech

to Inspire DMM Success



### 2017 AADMM Annual Conference

November 10-12 | San Diego, California

#### Opportunities At-A-Glance

	Platinum Sponsor \$1,500	Gold Sponsor \$1,000	Silver Sponsor \$750	Bronze Sponsor \$500	Supporter Sponsor \$250
5 minute promotional presentation at conference kickoff	X				
Article or ad in <i>The Account</i> newsletter	X	X			
One complimentary conference registration	X	X			
Acknowledgement on the conference website	X	X			
Access to electronic conference attendee list	X	X	X		
Sponsorship of ONE AADMM "News You Can Use"	X	X	X		
One Demo table for your products or services	X	X	X	X	
Recognition in conference promotional emails to our full email list	X	X	X	X	
Your logo on signage at conference	X	X	X	X	X
Your sponsorship with logo included in the printed materials distributed at the conference	X	X	X	X	X
Opportunity to provide an approved handout in each attendee packet					X

# About The American Association of Daily Money Managers

The American Association of Daily Money Managers (AADMM) is a national membership organization representing individuals and businesses in the growing profession of daily money management. These professionals provide personal financial services to seniors and older adults, people with disabilities, busy professionals, high net worth individuals, small business owners and others. AADMM has seen its membership increase significantly over the past few years and on average, 15 new members join each month!

A daily money manager (DMM) brings clarity and order to an individual's daily management of personal bills, budgets and record keeping. DMMs assist clients with activities such as bill paying, day-to-day banking, budgeting, insurance paperwork, and organizing records and receipts in preparation for income tax filing. Daily money managers are not financial planners or advisers and do not provide investment, tax or legal advice unless certified to do so. They do not take the place of accountants, attorneys, investment advisors or social workers, but rather complement services provided by these professionals.

## About the AADMM Annual Conference

Each year, daily money management professionals from across the nation gather for AADMM's annual conference. This event brings together like-minded professionals for a weekend of educational sessions and networking events. It is the ideal platform to share your brand, products and services with your target customers. The 2017 Annual Conference will be held Nov. 10 – 12 in San Diego, California with the theme: *Tools + Tech to Inspire DMM Success*.

## AADMM Annual Conference Sponsorship Options

Multiple sponsorship levels are available. AADMM's current conference schedule does not allow for an exhibition hall; however, we will have sponsor tables available for Silver-level sponsors and above, and will designate times during the schedule when attendees can network with sponsors.

**Platinum, Gold, Silver, Bronze and AADMM Supporter Sponsorship Opportunities allow you to:**

- *Increase visibility for your company*
- *Generate greater awareness of your product*
- *Introduce new products*
- *Showcase products with demonstrations*
- *Educate current and potential clients about your services*
- *Stay current – or surpass – competitors*

## Can't commit this year? Let us know you can for 2018!

We understand that your budget may not permit sponsorship this year, but if you're interested in becoming a 2018 sponsor we would love to have your support. Just complete the attached agreement, check the box for 2018 and AADMM will bill you after the New Year.

**AADMM**  
American Association of Daily Money Managers

# Sponsorship Opportunities

## Choose an opportunity from one of the following sponsorship levels

*The deadline to be eligible for sponsor benefits as outlined is September 8, 2017.*

Sponsorships are made available through submission of the AADMM sponsor agreement. You will be contacted when your agreement and payment have been confirmed by the AADMM Business Office. If you need additional details about sponsorship opportunities, please contact [info@aadmm.com](mailto:info@aadmm.com) or 814-357-9191.

### AADMM SUPPORTER – \$250

- Opportunity to provide an approved promotional handout in each attendee packet.
- Recognition in the conference on-site program and signage at the event. (The printed program is distributed to all attendees and sponsors at the event.)

### BRONZE SPONSORSHIP – \$ 500

- Recognition in the conference on-site program and signage at the event. (The printed program is distributed to all attendees and sponsors at the event.)
- Recognition in conference promotional emails to our full email list (includes members/non-members/affiliates).
- One demo table on Saturday, Nov. 11. (Includes breakfast, lunch and opportunity to join attendees in the evening dine-around.)

### SILVER SPONSORSHIP - \$750

- Recognition in the conference on-site program and signage at the event. (The printed program is distributed to all attendees and sponsors at the event.)
- Recognition in conference promotional emails to our full email list (includes members/non-members/affiliates).
- One demo table on Saturday, Nov. 11. (Includes breakfast, lunch and opportunity to join attendees in the evening dine-around.)
- Sponsorship of ONE AADMM “News You Can Use” e-blast distributed to AADMM membership. (*Average 800 members.*)
- An electronic version of our conference attendee list to be received by email two weeks after the close of conference.

### GOLD SPONSORSHIP - \$1,000

- Recognition in the conference on-site program and signage at the event. (The printed program is distributed to all attendees and sponsors at the event.)
- Recognition in conference promotional emails to our full email list (includes members/non-members/affiliates).
- Link on AADMM website conference page.
- An electronic version of our conference attendee list to be received by email two weeks after the close of conference.
- One Conference Registration - includes access to educational programming and conference materials. Travel not reimbursed.
- One demo table for duration of conference.
- Sponsorship of ONE AADMM “News You Can Use” e-blast distributed to AADMM membership. (*Average 800 members.*)
- Half page ad in ONE issue of AADMM’s newsletter, *The Account*.

### PLATINUM SPONSORSHIP – \$1,500

- Recognition in the conference on-site program and signage at the event. (The printed program is distributed to all attendees and sponsors at the event.)
- Recognition in conference promotional emails to our full email list (includes members/non-members/affiliates).
- Link on AADMM website conference page.
- An electronic version of our conference attendee list to be received by email two weeks after the close of conference.
- One demo table for duration of conference.
- One Conference Registration - includes access to educational programming and conference materials. Travel not reimbursed.
- 5 minute promotional presentation at Conference Kickoff
- Sponsorship of ONE AADMM “News You Can Use” e-blast distributed to AADMM membership. (*Average 800 members.*)
- One article OR half page ad in four issues of AADMM’s newsletter, *The Account*.

## AADMM Sponsor Agreement

2017 Annual Conference • November 10 - 12 • San Diego, CA

In this box provide the information as you want it used on promotional materials.

Company Name \_\_\_\_\_

Name and Title of Person You Want Listed on Conference Promotions – (Give the name of the person you want people at the conference to contact within your company. **Information written here is for promotional purposes on the web and printed materials**). \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

Website \_\_\_\_\_

Email \_\_\_\_\_

### Complete this section to become a sponsor:

We hereby agree to contribute the sum of \$\_\_\_\_\_ to be a sponsor at the level noted below. We understand that benefits for sponsorship will be supplied as indicated at specific levels in the Sponsorship Packet, provided that full information and a commitment for payment are received by AADMM no later than Friday, September 8, 2017. For more information about sponsorship opportunities or details about benefits, contact the AADMM Business Office: info@aadmm.com or 814-357-9191.

Indicate your sponsorship below by placing a checkmark next to your selected level:  
(details listed on previous page)

\_\_\_ \$1,500 PLATINUM SPONSOR

\_\_\_ \$1,000 GOLD SPONSOR

\_\_\_ \$750 SILVER SPONSOR

\_\_\_ \$500 BRONZE SPONSOR

\_\_\_ \$250 AADMM SUPPORTER SPONSOR

We can't Participate in 2017, but count us in for 2018 at the level selected below:

\_\_\_ \$1,500 PLATINUM SPONSOR

\_\_\_ \$1,000 GOLD SPONSOR

\_\_\_ \$750 SILVER SPONSOR

\_\_\_ \$500 BRONZE SPONSOR

\_\_\_ \$250 AADMM SUPPORTER SPONSOR

**BOTH pages of this Sponsor agreement must be completed and submitted to AADMM.**

# Agreement for Sponsorship - 2017 AADMM Annual Conference

Company name: \_\_\_\_\_

**Conference Registration:** Use the line below to register the person who will use the complimentary registration as outlined at your level of sponsorship (Gold and Platinum only). Write the name as it should appear on the name badge. If you need more registrations than allotted, contact the AADMM Business Office at 814-357-9191.

Name: \_\_\_\_\_

To decline your complimentary registration indicate here:  NO, we will not be using our complimentary conference registrations.

**IMPORTANT Company Logo:** ALL Sponsors must provide an electronic/digital copy of the company logo for use on signs and other acknowledgements. The logo should be submitted with this agreement, but absolutely no later than September 9, 2016. A high resolution color TIF or JPG provides best reproduction.

An electronic copy of our logo is enclosed.  An electronic copy of our logo will be emailed to info@aadmm.com

**No sponsorship is considered reserved until AADMM receives this agreement with authorized signature and commitment for sponsorship payment. Sponsor CANCELLATION POLICY: Cancellations received by Friday, September 8 will result in a refund of 75%; 25% will be retained for administrative services. No refunds will be given after September 8.**

## ALL Sponsors must complete the section below: THIS AGREEMENT IS AUTHORIZED BY

Hold Harmless Agreement – The sponsor listed herein assumes full responsibility and agrees to indemnify and defend AADMM and the conference hotel and their respective employees, agents, and officers against any claims and expense arising out of the use of the premises at said conference hotel during the AADMM Conference on November 10 - 12, 2017. The sponsor understands that neither AADMM nor the conference hotel maintains insurance covering the sponsor's property, and it is the sole responsibility of the sponsor to obtain such insurance. We fully agree to the terms here of:

Name and Title of Authorizing Agent \_\_\_\_\_

Authorizing Agent's Signature \_\_\_\_\_

Mailing Address for Invoice \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip code \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_

**TOTAL PAYMENT IN THE AMOUNT OF: \$\_\_\_\_\_ (Please make a copy for your records.)**

Method of Payment:  Check/Money Order Enclosed  Payment by Credit Card

We require an emailed receipt when payment is processed.

<p>MAIL check or money order payable to AADMM with both pages of the Agreement to the AADMM Business Office:</p> <p>174 Crestview Drive, Bellefonte, PA 16823 Toll Free: 814-357-9191 Email: info@aadmm.com Our Federal ID #52-1944683</p> <p>Allow 7-10 business days to process payment.</p>	<p>FAX both pages of the Agreement with credit card information to: 814-355-2452</p> <p>Credit Card Information: _____ Visa _____ MasterCard</p> <p>_____ Name on card (print)</p> <p>_____ Account Number                      Security Code</p> <p>_____ Exp. Date                      Signature</p>
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**BOTH pages of this Sponsor agreement must be completed and submitted to AADMM.**