

RIA CONFERENCE  
**SYNERGY**

**'17**

Sponsor Brochure

Presented by





Welcome to Synergy2017

Synergy2017 promises to be a wonderful opportunity to showcase your company. Based on last year's conference we anticipate more than 150 advisors in attendance again this year. These business owners and decision makers are the people you want to meet.

Our goal is to give you more access to advisors through general session speaking opportunities, longer networking breaks, networking lunches, a reception in the sponsor area, and the freedom to meet with potential clients in the evenings.

So make plans to meet advisors face-to-face at Synergy2017!

For additional information see our website at [Synergy.TradePMR.com](http://Synergy.TradePMR.com) or contact Ellen Weintraub at [eweintraub@tradepmr.com](mailto:eweintraub@tradepmr.com).

Hope to see you at Synergy2017!

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(352) 332-8723 ext. 602  
[eweintraub@tradepmr.com](mailto:eweintraub@tradepmr.com)

# Synergy Dates & Times

## Wednesday, May 3rd

8:00 – 10:00	Registration Open
10:00 – 2:00	Mimosa Brunch Cruise on The Venetian Lady, touring beautiful Miami Beach, while networking with TradePMR staff and fellow advisors.
2:00 – 6:00	Registration Open
3:00 – 5:00	<b>Exhibit Hall Set Up</b>
6:00 - 7:00	Ocean Garden Welcome Reception <i>Come connect with other advisors and TradePMR staff. Make plans to continue your conversation over dinner.</i>

## Thursday, May 4th

8:00 – 9:00	Networking Breakfast - <b>Exhibit Hall Open</b>
9:00 – 10:15	General Session
10:15 – 10:45	Networking Break - <b>Exhibit Hall Open</b>
10:45 – 12:00	General Session
12:00 – 1:30	Succession Planning Lunch provided
1:30 – 2:15	Sponsor Breakout Session 1
2:15 – 2:30	Break
2:30 – 3:15	Sponsor Breakout Session 2
3:15 – 3:30	Break
3:30 – 4:15	TradePMR Breakout Session 3
4:15 – 4:30	Break - <b>Exhibit Hall Open</b>
4:30 – 6:00	Keynote Speaker – Mike Rayburn – “What if...?” <i>World-class guitarist and stand-up comedian, he will teach you to access your unrealized potential to look at old things in a new way to leap beyond your perceived limitations.</i>
6:00 – 7:00	Networking Reception <b>in the Exhibit Hall</b>

## Friday, May 5th

8:00 – 9:00	Networking Breakfast
9:00 – 12:00	General Session - <b>Exhibit Hall Breakdown</b>

# Sponsorship Opportunities

## **Marquee \$30,000**

First category to select 16x8 exhibit booth placement

One custom gift giveaway to attendees:

Lanyard

Tote bag

One 45-minute speaking opportunity in General Session

Copy of our full advisor contact list four weeks prior to the conference

Full page advertisement in conference program

Plus all the benefits included in silver sponsor package

## **Platinum \$12,000**

Second category to select 8x8 exhibit booth placement

Copy of our full advisor contact list four weeks prior to the conference

Two sponsor breakout sessions

Full page advertisement in conference program

Plus all the benefits included in silver sponsor package

## **Gold \$8,000**

Third category to select 8x8 exhibit booth placement

One sponsor breakout session

Half page advertisement in conference program

Plus all the benefits included in silver sponsor package

## **Silver \$3,000**

Fourth Category to select 8x8 exhibit booth placement

Copy of our attendee contact list after the conference

Logo recognition on conference website

Logo recognition in on-site print materials

Conference admission for two representatives

### **Add to any sponsor package:**

- 1. TED Talk \$1,000**  
5-minute speaking opportunity in General Session.
- 2. Video Advertisement \$1,000**  
45 second sponsor-provided video advertisement shown in General Session before keynote speaker
- 3. Webinar \$1,000**  
One webinar scheduled for all advisors through TradePMR before or after the conference

# Sponsorship Agreement

## Contact information

Name of Company *(as you would like it printed in conference materials)*

\_\_\_\_\_

Contact Person \_\_\_\_\_ Title \_\_\_\_\_

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

Mailing Address \_\_\_\_\_

## Attendees

Name _____	Name _____
Title _____	Title _____
Cell <i>(for onsite)</i> _____	Cell <i>(for onsite)</i> _____
Email _____	Email _____

## Sponsorship Level

- Marquee \$30,000
- Platinum \$12,000
- Gold \$8,000
- Silver \$3,000

## Add-Ons

- TED Talk \$1,000
- Video Advertisement \$1,000
- Webinar \$1,000
- Breakfast Cruise \$400 per attendee

## Payment information

 Make checks payable to **TradePMR Group, Inc.**

Check # \_\_\_\_\_ Credit Card:  Visa  MasterCard

Billing Contact \_\_\_\_\_

Card Number \_\_\_\_\_ CVV \_\_\_\_\_ Exp Date \_\_\_\_\_

Cardholder's Name *(Print)* \_\_\_\_\_ Signature \_\_\_\_\_

Address Associated with Card

\_\_\_\_\_

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## Conference Program Advertisements

Our sponsors will be listed on our conference website. Please provide a copy of your **company logo** and a link to your company **website** with this agreement for our Synergy2017 website.

The Marquee, Platinum, and Gold Sponsorships include an advertisement in the conference program. TradePMR must receive the print-ready ad copy no later than April 3, 2017. The advertisement should provide an overview of your company and services. The Marquee and Platinum Sponsorships should be no larger than 8" x 10.5." The Gold Sponsorship should be no larger than 8" x 5".

As an exhibitor, you acknowledge that all advertising materials are subject to TradePMR's review and may be required to be modified if such advertisements do not meet financial services industry standards.

## Exhibition Rules and Regulations

**Space Assignment:** Exhibit space will be assigned on a first-come, first-served basis. No space will be assigned until full payment is received. TradePMR reserves the right to shift space assignment after the contract has been signed if it becomes necessary to do so. Space is leased with the understanding that the exhibitor will hold TradePMR harmless and indemnify from any and all liability which may result from any cause.

**Payment:** Payment is due in full by April 3, 2017.

**Cancellations:** Any cancellation must be made in writing. This agreement cannot be cancelled after April 3, 2017. After April 3, 2017 the exhibitor and/or signee are fully responsible for all charges as outlined on the front of this agreement whether the exhibitor uses the contracted space or not. Payment is due in full with this agreement.

**Arrangement of Exhibits:** Exhibit booths are furnished with skirted tables, chairs, and a power source. The exhibitor must provide to TradePMR no later than April 3, 2017, a list of additional services or requirements, including equipment, furniture, electric requirements, etc. The additional services and requirements are the sole responsibility of the exhibitor and will be invoiced directly to the exhibitor by the hotel. The hotel may not accommodate requests made after April 3, 2017.

**Package Room:** A package room is available for receipt, holding, and delivery of packages to the exhibit showcase. The package room may not be used as storage. Packages for functions may be delivered to the hotel up to one week prior to the event. Send packages to the following address:

Eden Roc Miami Beach Resort  
4525 Collins Ave  
Miami Beach, FL 33140  
HOLD FOR (Your Company Name)  
Synergy2017

All shipments and packages are handled by the UPS Store in the business center of the hotel. The exhibitor is responsible for all storage and handling fees charged by the hotel (list of prices available on request).

**General Restrictions:** The use of flammable and volatile materials is prohibited. This includes tanks and attached machinery and vehicles. All butane, propane, and/or any other kinds of flammable gas pressured vessel, including empty vessels, are strictly prohibited. Draping materials and other decorative materials must be flame-proof and comply with all state and local regulations. Exhibitors are prohibited from using amplifying equipment that is objectionable. Exhibitors must confine their activities to their contracted space. Exhibitors will not be permitted to use strolling entertainment or to distribute samples or souvenirs except from their own exhibit space. TradePMR reserves the right to require modifications of any questionable exhibitor.

**Liabilities:** The exhibitor agrees to hold harmless and indemnify TradePMR, its affiliates, employees, and agents and the hosting facility and its employees for any damages to, loss of, or destruction of the exhibitor's property or injuries to the exhibitor, its representatives, agents, or employees. The exhibitor expressly waives all claims for loss, damage, destruction, or injury. TradePMR and its affiliates will not be liable for failure to hold the exhibition as scheduled or for cancellation as a result of fire, or any act of

nature, or the public enemy, or strike, or epidemic, or any law or regulation of public authority, or any other act beyond the control of TradePMR which makes it impossible or impractical to hold the exhibition. Any payment for booth space, less actual expenses incurred in connection with the exhibits, will be returned upon such cancellation.

**Insurance:** Exhibitors wishing to insure their materials, goods, and/or wares on display in the exhibit against damage by fire, accident, loss or liability of any kind, must do so at their own expense.

**Admissions:** TradePMR will have sole control over the admissions of persons. All persons visiting the exhibit area must be registered for the conference.

**Rules and Regulations:** Exhibitors will abide by all other provisions of these rules and regulations, with the fire regulations, and all other regulations of government agencies and the hosting facility. It is expressly understood and agreed by the exhibitor that the rules and regulations of the exhibit as issued or amended by TradePMR are hereby made an integral part of the contract and of the agreement between the exhibitor and TradePMR.

**Non-Competition:** As an exhibitor, you acknowledge and agree that the sale or unauthorized use or disclosure to any third party for any purpose of TradePMR's proprietary information constitutes unfair competition.

As an exhibitor, you agree not to engage in or participate in any unfair competition with TradePMR. Exhibitor agrees not to contact, directly or indirectly, the clients disclosed by Trade-PMR for purposes of soliciting business away from TradePMR or for introducing to clients any third parties who have any business interest which competes with TradePMR.

As an exhibitor, you shall not, without the prior written approval of an authorized officer of TradePMR, directly or indirectly, disclose proprietary information to any person or entity except for its employees, attorneys or accountants on a need-to-know basis or as may be required by law or regulation or demanded by any court or administrative agency.

We agree to comply with the exhibit regulations, instructions, and conditions as published with this agreement and with all conditions under which the facilities have been rented to Trade-PMR, Inc.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Title



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events@tradepmr.com

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