Connect. Engage. Impact.

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Washington, D.C. 20005
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sponsor@tei.org

2027

Tax Executives Institute

Sponsorship Opportunities

2027 SPONSORSHIP PROSPECTUS

The Value

"TEI has a fantastic membership of sophisticated tax people...and that is just spot on with the people that I want to connect with."

Founded nearly eight decades ago, Tax Executives Institute is the preeminent association of in-house tax professionals worldwide. The Institute's more than 7,000 members work for 2,900 of the largest companies in North America, South America, Europe, and Asia, and they participate in a wide array of educational, networking, and advocacy activities.

TEI sponsors can "make their mark" and place themselves in front of members in multiple ways. Opportunities include speaking at conferences, seminars, and courses, partnering on webinars, providing content for TEI's *Thought Leadership Bulletin*, and writing articles for and advertising in *Tax Executive* magazine and on TEI.org.

We have structured these benefits to connect you, in an impactful way, with our members throughout the year, leveraging multiple touch-points and TEI platforms.

The global economic outlook has only heightened the imperative for you, leaders of the tax advisory and tax technology communities, to have your firm's name, its support for, and its commitment to TEI's educational, networking, and advocacy efforts always on display. We are excited to offer several new and enhanced sponsorship benefits that will provide you with a steady presence before the Institute, our regions, and chapters.

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Sponsors

TEI'S EXCLUSIVE AFFINITY PARTNER

Thomson Reuters

PLATINUM

Andersen
BDO USA LLP
Bloomberg Tax
C-A-C, part of The Baldwin Group
Crowe Advisory LLC
Crux
CSC Corptax, Inc.
Deloitte Tax LLP
Ernst & Young LLP
Eversheds Sutherland (US) LLP
Forvis Mazars, LLP
Grant Thornton Advisors LLC
KPMG LLP
Mayer Brown
PricewaterhouseCoopers LLP
Reunion
RSM US LLP
Ryan/tax.com
Vertex, Inc.
Vinson & Elkins
Wells Fargo Bank, N.A.
Wolters Kluwer

GOLD

Accordance
ADP
AON
Arizona Leadership Foundation
Asbury Gardner
Baker McKenzie
Basis Climate
Canaccord Genuity/CRC-IB
Foss and Company
Global Tax Management
Kirkland & Ellis LLP
Latham & Watkins LLP
Monarch Private Capital
Morgan Lewis & Bockius LLP
Notice Ninja Inc.
Skadden, Arps, Slate, Meagher & Flom LLP
Sovos Compliance, LLC
Sugar Creek Capital

SILVER

Alvarez & Marsal Tax
Avalara
Baker Tilly US
Blank Rome
Cherry Bekaert Advisory LLC
CliftonLarsonAllen (CLA)
Concentro
DST Advisory Group
Foxwood Tax Search
Gibson Dunn & Crutcher LLP
Keeyns
MASSIE R&D Tax Credits
Mickelson & Company
Neo.tax
Plante Moran
Riveron
SAP SE
Step Up For Students
Stonehenge Capital LLC

BRONZE

Advantage Capital
Alston & Bird LLP
Birch Risk Advisors
Chamberlain, Hrdlicka, White, Williams & Aughtry
Churchill Stateside Securities
Crowell & Moring LLP
DLA Piper US LLP
Greenberg Traurig
Holland & Hart
Holland & Knight
Ivins, Phillips & Barker, Chartered
King & Spalding
Loyens & Loeff
McCarthy Tetrault LLP
McDermott Will & Schulte LLP
Miller & Chevalier, Chartered
Pillsbury Winthrop Shaw Pittman LLP
Reed Smith LLP
Savant Labs
Taft Stettinius & Hollister LLP
Troutman Pepper Locke LLP
Valuation Research Corporation
White & Case LLP

The Benefits

	Platinum	Gold	Silver	Bronze	Tax Technology Seminar
Access to Members: Email					
Enhanced Benefit — Preliminary attendee list provided 4, 3, 2 and 1 week(s) before the Midyear and Annual Conferences with permission to send one email to each attendee before each Conference	✓				
Preliminary attendee list (without emails) provided 2 weeks before the Midyear and Annual Conferences		✓			
Final attendance list for Midyear and Annual Conferences (without emails) and one email to participants within one month of each conference (distributed by TEI)	✓	✓	✓	✓	
One email per calendar year to the TEI membership (distributed by TEI, at timing to be determined, HTML and opt-out required)	✓				
Preliminary attendee list provided 2 weeks before the Tax Technology Seminar(without emails) and one email to each attendee before the Seminar (distributed by TEI)	✓	✓	✓	✓	✓
Final attendance list for Tax Technology Seminar (without emails) and one email to participants within one month of Seminar (distributed by TEI)					✓
Access to Members: Networking					
Tickets for non-speakers to attend Welcome and Grand networking receptions at the Midyear and Annual Conferences	✓ 5	✓ 3	✓ 2	✓ 1	
Tickets for non-speakers to attend Welcome and Networking receptions at the Tax Technology Seminar					✓ 3
Opportunity to sponsor social events at the annual Federal and International Tax Courses ($ Additional Cost)	✓ $	✓ $	✓ $	✓ $	$
Enhanced Benefit — **Exhibits and Lead Capture**					
In-person exhibit with sales lead capture and tracking app at Midyear and Annual Conferences (Key: ★ Premium Placement, $ Additional Cost)	✓ ★	✓	✓ $		
In-person exhibit with sales lead capture and tracking app at Tax Technology Seminar					✓
Thought Leadership					
Opportunity to host page in Chapter | Sponsor Connection Portal for establishing relationships and engagements with TEI chapters and regions	✓	✓	✓	✓	
Opportunity to include content from firm's website in TEI's *Thought Leadership Bulletin* (Key: # Submissions per month)	✓ 4	✓ 4	✓ 2	✓ 2	
NEW! — Profile page on TEI.org with Name, Logo, Description, Video link and 18 months worth of your Thought Leadership Bulletin submissions. TEI.org receives over 40,000 visits per month.	✓	✓			

The Benefits

	Platinum	Gold	Silver	Bronze	Tax Technology Seminar
Advertising					
NEW! A 300x250 pixel digital ad on TEI.org linking to a website of your choice	✓	✓			
Full-page, color advertisements in every issue of *Tax Executive*	✓				
Two full-page, color advertisements in *Tax Executive* per year plus 15% discount on additional paid advertisements		✓			
Two half-page, color advertisements in *Tax Executive* per year			✓		
Sponsorship acknowledgment in all issues of *Tax Executive*	✓	✓	✓	✓	
Sponsorship acknowledgment in one issue of *Tax Executive*					✓
Digital Ad on Midyear and Annual Conferences' app	✓	✓			
Brand Amplification					
Logo and link to website of your choice on TEI's Midyear and Annual Conferences' microsite and/or app	✓	✓	✓	✓	
Acknowledgment and link (with sponsor logo) on TEI's website	✓	✓	✓	✓	
Logo and link to website of your choice on Tax Technology Seminar microsite and app					✓
NEW! Use of approved version of TEI's logo and sponsor level (subject to review and approval by TEI Marketing & Communications)	✓	✓	✓	✓	
Regional and Chapter Connections					
Listing of TEI's 55 Chapter Presidents, 11 Regional Vice Presidents, and Committee Chairs with email addresses	✓	✓	✓	✓	
Warm introductions to Chapter and Regional Leaders by TEI's Director of Sponsor Relations	✓	✓	✓	✓	
Opportunities to participate in Regional Conferences and Chapter Events	✓	✓	✓	✓	

All benefits are subject to terms and conditions.
Please contact Amanda Sturdevant, Sponsor Relations Director, asturdevant@tei.org, for details.

2027 Conferences

TEI's Midyear and Annual Conferences, which take place each spring and fall, are the highlights of TEI's educational calendar. These conferences offer multiple tracks of substantive programming with a range of plenary and concurrent sessions focusing on U.S. federal and international tax, and state taxation, as well as complementary tracks devoted to IRS administrative affairs, tax technology, and financial reporting matters. The Midyear and Annual Conferences draw hundreds of senior in-house tax professionals, TEI's chapter, regional, and Institute leaders, government representatives, practitioners, and service providers.

- 2027 Midyear Conference
  March 21-24, 2027
  Washington, DC

- 2027 Annual Conference
  October 24-27, 2027
  Scottsdale, AZ

In addition, TEI organizes various educational seminars, courses, and webinars at the Institute level throughout the year. Its 55 chapters and 11 regions also organize various conferences and single-day sessions for our members worldwide.

The full Institute-level calendar, which is updated regularly, is accessible at: https://www.tei.org/events-education/events

Sponsorship with TEI is a holistic and strategic year-long partnership between our organizations. Together, we will focus on understanding your firm's practice goals and assist with making connections at events that are beneficial to you and our members throughout the global TEI organization.

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Tax Technology Seminar

Sponsors seeking to engage with in-house tax professionals and tax technologists may also secure an exhibit at TEI's 2027 Tax Technology Seminar on a space-available basis.

The Tax Technology Seminar brings together hundreds of in-house tax professionals, tax technologists, service providers, and technology companies each year. The Seminar features panels, roundtables, and workshops to survey technology and automation tools, trends, and strategies to elevate the tax function, making this annual seminar a must-attend event for in-house professionals.

As with past years, the 2027 Seminar will facilitate the interactivity, engagement, and networking opportunities that made prior year seminars a resounding success, including a robust exhibit hall that allows participants to experience new technology tools and connect directly with service providers and software companies.

Sponsors exhibiting at the Tax Technology Seminar receive an array of benefits, including attendee lists, post-event emails sent upon request, in-person tabletop exhibits and sales lead capture software, the opportunity to attend networking sessions, and recognition on the Tax Technology Seminar microsite, app, and *Tax Executive*. Space is limited, and general sponsors will be given priority to exhibit at the Tax Technology Seminar.

The 2027 Tax Technology Seminar will be held on May 2-5, 2027 at the Marriott Marquis, Atlanta, Georgia.

2026 TAX TECHNOLOGY SEMINAR EXHIBITORS

TEI'S EXCLUSIVE AFFINITY PARTNER

Thomson Reuters

Accordance
Andersen
Avalara
BDO USA, LLP
Bloomberg Industry Group
CFO Services
Corptax, Inc.
Crimson Partners
Crowe LLP
Decision Modeling, Inc.
Deloitte Tax LLP
Forvis Mazars, LLP
Global Tax Management
Grant Thornton Advisors LLC
IGEN
Incentify
Keeyns Portugal, S.A.
KPMG LLP
Neo.Tax
PowerPlan, Inc.
RSM US LLP
Ryan LLC
SAP SE
Savant Labs
Taxology (noticehub)
TPILab
Vertex, Inc.
Wolters Kluwer

TERMS & CONDITIONS

TEI's sponsorship program operates on an annual basis, with benefits accruing for 12 months from the date of commitment. Firms committing to multiple years of sponsorship are entitled to receive the rates in effect at the time of commitment for the full commitment period. We welcome the opportunity to discuss the billing arrangement that works best for your firm.

IN-PERSON EXHIBITS

Platinum and Gold Sponsors are entitled to set up a table-top exhibit during the Midyear and Annual Conferences. Silver sponsors may exhibit, subject to availability and the payment of an additional fee. Sponsors selecting the Tax Technology Seminar add-on are also entitled to exhibit at those events.

- Each sponsor's exhibit will consist of a 6' banquet-skirted table. The precise location of the exhibit, as well as the color of the skirting, will be determined at a later time. Preferences are based on sponsorship level and join/renewal dates. Two chairs, a trash can, and a sign with your firm's name will be included. Booth displays may not extend beyond 8 feet.
- Exhibiting sponsors will be provided with complimentary sales lead capture software, enabling them to easily scan attendees' badges to add them to their firm's email distribution and sales tracking lists with proper disclosures and consent. We encourage exhibiting sponsors to feature computer demonstrations and a variety of handouts and materials, such as brochures, publications, food items, raffles, and give-aways. Sponsors may hold drawings, but giveaways may not feature TEI's name or logo without advance written approval.
- Arrangements may be made with the official decorating company for equipment rental, telecommunications services, and shipping. Order forms will be provided at a later date. The cost of these services will be at the sponsor's expense.
- Details for the event set up and shipping logistics will be provided at a later date.
- Sponsors may have no more than two representatives at their exhibit at any time.
- Sponsors are required to comply, at their own expense, with any rules or requirements conference or seminar venues may have for exhibitors. This may include, for example, providing proof of insurance coverages that name the venue and its related entities as additional insureds under exhibitors' insurance policies.

EMAIL & PRIVACY RIGHTS

Sponsors acknowledge that they may not contact attendees with whom they do not have a pre-existing relationship except as provided in this prospectus. Sponsors using TEI's sales lead capture software must provide the necessary disclosures and obtain the attendee's consent before adding an attendee to the sponsor's contact or distribution lists. Sponsors must provide attendees with the option to opt out of future communications.

ATTENDANCE POLICIES

In general, to ensure the optimal networking experience for our members, sponsors may not register for or attend any Conference session unless a speaker from their firm is presenting on the panel.

Exhibitors are encouraged to participate in various networking opportunities and receptions using sponsor tickets (see Benefits section above). Speakers are encouraged to attend these events, as well as lunch on the day of their session.

Exhibitor representatives may not attend Conference lunches unless they are speaking on that day of the Conference.

LIABILITY

The aggregate liability of each party will not exceed the amount of fees paid by the sponsor to TEI under this agreement.

CANCELLATION

If TEI cancels the Midyear or Annual Conference, TEI will refund to sponsors the portion of the sponsorship fee attributable to the canceled event. Sponsors will also be entitled to a full refund of the Tax Technology Seminar exhibitor fee if that event must be canceled. TEI reserves the right to hold a hybrid or virtual event if required.

TERMS & CONDITIONS (CONT.)

TEI SPONSOR LOGO USAGE GUIDELINES

As an official sponsor of the Tax Executives Institute (TEI), you are permitted to use the TEI logo in accordance with the following guidelines:

1. **Approved Sponsor Logo Versions**
   Only official, unaltered versions of the TEI sponsor logo may be used. The logo must not be modified, redrawn, or distorted in any way.

2. **Background Requirements**
   The TEI sponsor logo must always be placed on a solid background that provides sufficient contrast to ensure legibility. Avoid using the logo on patterned or textured backgrounds.

3. **Clear Space Requirements**
   To maintain the integrity and visibility of the TEI sponsor logo, a minimum clear space must be maintained on all sides. This space must be equal to the height of the capital "T" in the TEI logo. No other logos, text, or graphic elements may encroach on this area.

4. **Proximity to Other Logos**
   The TEI sponsor logo must be placed at a reasonable distance from other logos. A minimum separation equal to twice the height of the capital "T" in the TEI logo should be maintained between the TEI logo and any other logos or graphic elements.

5. **Size and Proportion**
   The logo must be scaled proportionally and remain legible at all sizes. Do not reduce the logo to a size smaller than 1 inch (2.54 cm) in width for print or 100 pixels for digital use.

6. **Approval and Questions**
   All unmentioned uses of the TEI sponsor logo must be reviewed and approved by TEI's Marketing Department. Please submit proposed materials to amazur@tei.org for review.

By using the TEI sponsor logo, you agree to comply with these guidelines. TEI reserves the right to revoke usage rights at any time if the logo is used improperly or in a manner inconsistent with TEI's brand standards.

HOW WE DEVELOP EDUCATIONAL PROGRAMMING

TEI's educational programming comes from three primary sources:

1. Our member committees' suggestions;
2. Our team of tax attorneys who lead the above committees, as well as TEI's advocacy efforts; and
3. Responses to our RFPs.

From these three sources we create technical panel discussions staffed by leading practitioners and moderated by a TEI member charged with ensuring the sessions will resonate with an in-house audience. We rarely choose sessions exactly as they are proposed and frequently receive multiple RFP responses suggesting the same or similar topics. Thus, it should not come as a surprise if you are asked to participate in a panel that differs from those you proposed. It is nevertheless important to submit RFP responses because they inform us of the topics Sponsors would like to present to TEI's membership and the specific practitioners who would like to participate.

We deeply value our Sponsors' support and invest significant time and effort developing event programs that allow sponsoring firms to meaningfully participate in our events. When practitioners from multiple Sponsors wish to speak on the same or similar topics, our program planning team considers several factors, including, among other things, whether a practitioner possesses unique experience or insights, their personal speaking and communication skills, and input from our members. Sponsoring firms receive priority based on levels of sponsorship and past involvement in TEI events. It's important to remember, however, that speaking opportunities are not included in the Sponsorship Agreement and are never guaranteed. TEI gives priority to the topics our members suggest, and we do our best to deliver programming that in-house tax professionals find timely, compelling and worth their time/travel, while also balancing the goals of our Sponsor firms.

2027 RATES

Prices are for one full year from the date of commitment, guaranteed until June 30, 2027. Sponsors may secure multiple year commitments at the current year rates.

(mark your choices)

PLATINUM	**2027 Price**	**$90,500**	☐
	$5,000 Appreciation Discount available to firms that have been continuous sponsors since March 2022 – call for confirmation of eligibility.		
GOLD	**2027 Price**	**$65,000**	☐
SILVER	**2027 Price**	**$44,000**	☐
	➤ Midyear Conference In-Person Exhibit Upgrade	$8,000	☐
	➤ Annual Conference In-Person Exhibit Upgrade	$8,000	☐
BRONZE	**2027 Price**	**$31,000**	☐
TAX TECHNOLOGY SEMINAR	**2027 Sponsor Price**	**$8,000**	☐
	2027 List Price	**$16,000**	☐

PAYMENTS

For ACH Transaction/Wire Transfer instructions, please contact accountspayable@tei.org. Checks should be sent by mail to: PO Box 641084, Pittsburgh, PA 15264-1084. Checks should be made payable to Tax Executives Institute.

SPONSOR INFORMATION

Primary Contact Name _____

Company _____

Mailing Address _____

City _____

State/Province _____ Zip/Zone _____

Telephone _____

Email _____

Does your firm have a preference for how it is referred to in acknowledgments, educational programs, etc. (i.e., a "brand name" or legal entity name that TEI should use for all purposes)? In the absence of a stated preference, TEI will use the sponsor's formal name.

If yes, please list: _____

ADDITIONAL INFORMATION

Please provide additional contact information. These names should be the individual in your firm (or outside consultant) who will have responsibility for managing the area indicated.

For Advertisements (*Tax Executive*) — Name _____ Email _____

For Exhibits (if applicable) — Name _____ Email _____

General Sponsorship Matters (Secondary contact information) — Name _____ Email _____

Thought Leadership Bulletin — Name _____ Email _____

Chapter | Sponsor Connection Portal — Name _____ Email _____

Requests for Session Proposals — Name _____ Email _____

Name _____ Email _____