



Connect. Engage. Impact

1200 G Street NW, Suite 300
Washington, D.C. 20005
P: 202.638.5601 • F: 202.638.5607
Email: asktei@tei.org

2023

Tax Executives Institute **Sponsorship Opportunities**

NEW SPONSORSHIP BENEFITS!

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 more than seven decades ago, Tax Executives Institute is the preeminent association of in-house tax professionals worldwide. According to *Tax Business* magazine, TEI represents “the biggest, richest, and most influential group of taxpayers in the world.” The Institute’s 6,000 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 TEI members in multiple ways, including: speaking opportunities at TEI’s conferences, seminars, and courses, partnering with TEI on webinars, including sponsor website content in TEI’s *Thought Leadership* bulletin, and writing articles for and advertising in *Tax Executive* magazine.

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 post-pandemic and global economic outlook have 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, with more to be released in the coming months, that will provide you with a steady presence before the Institute, our regions, and chapters.

Sponsors

TEI'S EXCLUSIVE AFFINITY PARTNER

Thomson Reuters

PLATINUM

ADP
Andersen
Avalara
Baker McKenzie
Bloomberg Tax & Accounting
Crowe LLP
CSC Corptax
Deloitte Tax LLP
Ernst & Young LLP

Eversheds Sutherland LLP
FORVIS
KPMG LLP
Massie R&D Tax Credits
Mayer Brown LLP
PricewaterhouseCoopers LLP
RSM US LLP
Vertex, Inc.

GOLD

CAC Specialty
Dixon Hughes Goodman LLP
DST Advisory Group
Experian Employer Services
Forte International LLC

insightsoftware
Latham & Watkins LLP
Morgan, Lewis & Bockius LLP
Orion Innovation
Skadden, Arps, Slate, Meagher & Flom LLP

SILVER

Alvarez & Marsal Taxand, LLC
Asbury Law Firm
BakerHostetler
Crowell & Moring LLP
Grant Thornton
Miller & Chevalier, Chartered

Reed Smith LLP
Sidley Austin LLP
Step Up for Students
Synergi Partners
Weil, Gotshal & Manges LLP

BRONZE

Alston & Bird LLP
Blank Rome LLP
Brewer Morris
DLA Piper LLP (US)
Foss & Company
Holland & Hart LLP
Holland & Knight
Ivins, Phillips & Barker, Chartered
King & Spalding LLP
McCarthy Tetrault

McDermott Will & Emery LLP
Morrison & Foerster LLP
Norton Rose Fulbright US LLP
Osler, Hoskin & Harcourt LLP
Pillsbury Winthrop Shaw Pittman
Troutman Pepper Hamilton Sanders LLP
True Partners Consulting LLC
Valuation Research Corporation
Winston & Strawn LLP



What our Sponsors are saying...

“This is **THE** organization for us to be a part of.”

“[TEI] is an **incredibly important** trade association for us...”

“When I’m at a TEI meeting, I feel like I’m **dealing with the real world.**”

“TEI gives us a platform to **showcase our best and brightest** subject matter experts.”

“This is the **go to organization** for getting after tax executives.”

“They’re doing it right.”

The Benefits

Platinum

Gold

Silver

Bronze

Tax Technology
Seminar Exhibitor

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



Enhanced
Benefit

Final attendance list for Midyear and Annual Conferences with permission to send one email to participants within one month of each conference (with advance approval of content)



One email per calendar year to the TEI membership (distributed by TEI, at timing to be determined)



Listing of TEI's 56 Chapter Presidents, 11 Regional Vice Presidents, and Committee Chairs



Preliminary attendee list provided 2 weeks before the Tax Technology Seminar with permission to send one email to each attendee before the Seminar



Final attendance list for Tax Technology Seminar with permission to send one email to participants within one month of Seminar (with advance approval of content)



Access to Members: Networking

Tickets for non-speakers to attend Welcome and Tuesday evening networking receptions at the Midyear and Annual Conferences



Tickets for non-speakers to attend Welcome and Networking reception at the Tax Technology Seminar



Exhibits and Lead Capture

Enhanced
Benefit

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

NEW!

Opportunity to host page in Chapter - Sponsor Connection Portal for establishing relationships and engagements with TEI chapters and regions



NEW!

Opportunity to include content from firm's website in TEI's *Thought Leadership Bulletin* (Key: # Submissions per month)



Opportunity to feature speakers at Institute-level, region and chapter events and committee calls



Opportunity to feature speakers at Tax Technology Seminar



The Benefits

Platinum

Gold

Silver

Bronze

Tax Technology
Seminar Exhibitor

Advertising in *Tax Executive*

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 acknowledgement in five issues of *Tax Executive*



Sponsorship acknowledgement in one issue of *Tax Executive*



Opportunity to purchase "official sponsor" discounted advertising in *Tax Executive*



Brand Amplification

Ad on Midyear and Annual Conferences' app



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 www.tei.org



Logo and link to website of your choice on Tax Technology Seminar microsite and/or app



All benefits are subject to certain terms and conditions. Please contact Martin Schuebel (mschuebel@tei.org) for details.

2023 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, international, 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, chapter, regional, and Institute TEI leaders, government representatives, practitioners, and service providers.

- ▶ 73rd Midyear Conference, March 19-22, Washington, DC
- ▶ 78th Annual Conference (75th Anniversary Event), October 22-25, New York, NY

TEI is excited to celebrate its 75th Anniversary at this year's Annual Conference, which will feature unique networking and social opportunities for members and sponsors.

In addition, TEI organizes various educational seminars, courses, and webinars at the Institute level throughout the year. Its 56 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.

Connect. Engage. Impact.

Tax Technology Seminar

Sponsors seeking to engage with in-house tax professionals and tax technologists may also secure an exhibit at TEI's 2023 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 available to elevate the tax function, making this annual seminar a must-attend event for in-house professionals.

The 2023 Seminar will be held the week of April 24. As with past years, the 2023 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 and email rights, 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.

TEI also welcomes ala carte sponsorship proposals you may be interested in pursuing. Please contact Pilar Mata at pmata@tei.org to discuss such opportunities.

2022 TAX TECHNOLOGY SEMINAR EXHIBITORS

TEI'S EXCLUSIVE AFFINITY PARTNER

Thomson Reuters

Alteryx, Inc.
BDO USA, LLP
Bloomberg Tax & Accounting
CFO Services
Crowe LLP
CSC Corptax
Deloitte Tax LLP
Ernst & Young LLP
Forte International Tax LLC
FORVIS

Global Tax Management
Global Software LLC dba insightsoftware
KPMG LLP
PMBA
PricewaterhouseCoopers LLP
RSM US LLP
TaxJar
True Partners Consulting
Vertex, Inc

TERMS & CONDITIONS

TEI's sponsorship program will operate 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 that seminar.

- ▶ Each sponsor's exhibit will consist of a 6' x 30" banquet-skirted table. The precise location of the exhibit, as well as the color of the skirting, will be determined at a later time. 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 permanently add them to their firm's email distribution and sales tracking lists with proper disclosures. 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.

ATTENDANCE POLICIES

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. Speakers are encouraged to attend these events, as well as lunch on the day of their session. Sponsors will be permitted to register for and attend TEI's 78th Annual Conference in New York City in October 2023.

LIABILITY

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

CANCELLATION

If TEI cancels the Midyear or Annual Conference, TEI will refund a 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 seminar must be canceled. TEI reserves the right to hold a hybrid or virtual event if required by COVID-19 conditions.

2023 RATES

Prices are for a full year from the date of commitment, guaranteed until December 31, 2023.

(mark your choice(s))

PLATINUM	2023 Price	\$88,500	<input type="checkbox"/>
-----------------	-------------------	-----------------	--------------------------

\$5,000 Appreciation Discount available to firms that have been continuous sponsors since March 2018 – call for confirmation of eligibility.

GOLD	2023 Price	\$62,500	<input type="checkbox"/>
-------------	-------------------	-----------------	--------------------------

SILVER	2023 Price	\$39,500	<input type="checkbox"/>
---------------	-------------------	-----------------	--------------------------

▶ Midyear Conference In-Person Exhibit Upgrade	\$7,500	<input type="checkbox"/>
--	---------	--------------------------

▶ Annual Conference In-Person Exhibit Upgrade	\$7,500	<input type="checkbox"/>
---	---------	--------------------------

BRONZE	2023 Price	\$29,500	<input type="checkbox"/>
---------------	-------------------	-----------------	--------------------------

TAX TECHNOLOGY SEMINAR	2023 Sponsor Price	\$7,500	<input type="checkbox"/>
-------------------------------	---------------------------	----------------	--------------------------

	2023 List Price	\$12,500	<input type="checkbox"/>
--	------------------------	-----------------	--------------------------

PAYMENTS

For ACH Transaction/Wire Transfers and credit card payments please call (202) 464-8358 for instructions.

By mail

Tax Executives Institute, Lockbox 9407 PO Box 70280, Philadelphia, PA 19176-0280.
Payable to Tax Executives Institute.

SPONSOR INFORMATION

Primary Contact Name_____

Company_____

Mailing Address_____

City_____

State/Province_____ Zip/Zone_____

Telephone_____ Fax_____

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_____

Sponsor - Chapter Portal

Name_____ Email_____

Requests for Session Proposals

Name_____ Email_____

Name_____ Email_____

Name_____ Email_____