



**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

# 2022-2023

## Tax Executive Institute

### Sponsorship Opportunities

**NEW SPONSORSHIP BENEFITS!**



**BECOME  
A  
SPONSOR**

# 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 firm 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.



# 2022 Sponsors

## TEI'S EXCLUSIVE AFFINITY PARTNER

Thomson Reuters

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

## PLATINUM

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

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

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

## GOLD

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

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

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

## SILVER

Alvarez & Marsal Taxand, LLC  
BakerHostetler  
Crowell & Moring LLP  
Reed Smith LLP

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

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

## BRONZE

Alston & Bird LLP  
Blank Rome LLP  
DLA Piper LLP (US)  
Holland & Hart LLP  
Ivins, Phillips & Barker, Chartered  
King & Spalding LLP  
McDermott Will & Emery LLP

Miller & Chevalier, Chartered  
Morrison & Foerster LLP  
Norton Rose Fulbright US LLP  
Osler, Hoskin & Harcourt LLP  
Troutman Pepper Hamilton Sanders LLP  
True Partners Consulting LLC  
Winston & Strawn LLP

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

Connect. Engage. Impact.

# The Benefits

Platinum

Gold

Silver

Bronze

## Access to Members: Networking and Email

Enhanced Benefit

Preliminary attendee list provided 4, 3, 2 and 1 week(s) before the Midyear and Annual Conferences (including email addresses) with permission to send one email to each attendee before each Conference



Enhanced Benefit

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



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



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



Listing of TEI's 57 Chapter Presidents, 11 Regional Vice Presidents, and Committee Chairs



## Exhibits and Lead Capture

Enhanced Benefit

In-person exhibit with sales lead capture and tracking app (Key: ★ Premium Placement, \$ Additional Cost)



## Advertising

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 each issue of *Tax Executive*



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



## Brand Amplification: Apps and Web Platform

Ad on Midyear and Annual Conferences' app



Acknowledgment and link (with sponsor logo) on [www.tei.org](http://www.tei.org)



Logo and link to website of your choice on TEI's Midyear and Annual Conferences' microsite and/or app



## Thought Leadership

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



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

# TEI Events

Sponsorship with TEI is a holistic and strategic year-long partnership between our organizations. Together, we will focus on understanding your firms' practice goals and assist with making connections throughout the global TEI organization that are beneficial to you and our members. TEI's 57 chapters and 11 regions all organize educational and networking events throughout the year. TEI organizes a variety of educational programs each year at the Institute-level. The full Institute-level calendar, which is updated regularly, is accessible at: <https://www.tei.org/events-education/events>.

In-person Institute-level events confirmed for the remainder of 2022 through April 2023 include (subject to change if warranted by adverse COVID-19 developments):

- ▶ 2022 U.S. International Tax Course, August 8-12, 2022, Georgia Tech Hotel & Conference Center, Atlanta, GA
- ▶ 2022 Audits & Appeals Seminar, September 20-22, 2022, Capital One Conference Center, Tysons Corner, VA
- ▶ 2022 77th Annual Conference, October 23-26, 2022, Westin Kierland, Scottsdale, AZ
- ▶ 2023 Midyear Conference, March 19-22, 2023, Grand Hyatt, Washington, DC
- ▶ 2023 Federal Tax Course Level 1, April 24-28, 2023, Michigan State University, E. Lansing, MI



Connect. **ENGAGE.** Impact.



## 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.

- ▶ 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, 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.
- ▶ Exhibits may be set up for the Midyear and Annual Conferences any time after 11:00 am on the Sunday of the event, and must be complete by 5 pm that day. Exhibits must remain set through to the conclusion of the exhibit program on Tuesday of the event. 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 network with conference attendees at the Sunday welcome reception, breakfasts, and breaks (all of which will take place in the exhibit hall) as well as the Tuesday networking using sponsor tickets. Speakers are encouraged to attend these events, as well as lunch on the day of their session. TEI may make exceptions for sponsors to register for certain events.

### 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. TEI reserves the right to hold a hybrid or virtual event if required by COVID-19 conditions.

**2022 RATES**

Prices are for a full year from the date of commitment, guaranteed until December 31, 2022.

			(mark your choice(s))
<b>PLATINUM</b>	<b>2022-2023 Bundled Price</b>	<b>\$88,500</b>	<input type="checkbox"/>
	<i>\$5,000 Appreciation Discount available to firms that have been continuous sponsors since March 2018 – call for confirmation of eligibility.</i>		
<b>GOLD</b>	<b>2022-2023 Bundled Price</b>	<b>\$60,000</b>	<input type="checkbox"/>
<b>SILVER</b>	<b>2022-2023 Bundled Price</b>	<b>\$37,000</b>	<input type="checkbox"/>
	▶ In-Person Exhibit Space Upgrade per event	\$ 7,500	<input type="checkbox"/>
<b>BRONZE</b>	<b>2022-2023 Bundled Price</b>	<b>\$25,000</b>	<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 \_\_\_\_\_ Phone \_\_\_\_\_

Email \_\_\_\_\_

For Exhibits (if applicable)

Name \_\_\_\_\_ Phone \_\_\_\_\_

Email \_\_\_\_\_

General Sponsorship Matters  
(Secondary contact information)

Name \_\_\_\_\_ Phone \_\_\_\_\_

Email \_\_\_\_\_