



The Tax Technology Association

Sponsorship Opportunities

2010

Thank you for being an ACT supporter. Enclosed you will find important information relating to sponsorship opportunities for 2010.

Annual
Sponsorship
Packet

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The Tax Technology Association

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August 3, 2009

Dear Vendor:

As a valued supporter of ACT, we would like to thank you. Your support means that our association is able to continue to provide leading edge tax and technology training to corporate tax and IT professionals throughout the year, while also providing our members with access and information relating to the most current trends in tax technology.

As you know, we are moving to one on-site conference next year, but we are continuing to offer bi-monthly webcasts, bi-monthly newsletters, and other educational opportunities. We are also considering other means of education, such as self-study programs and more virtual meetings. Because of these changes, we are also offering a new sponsorship program for 2010. We greatly value input from our supporting vendors, and based on feedback we have received, we are rolling out this new program. The intention of the new program is to give you the flexibility to choose a package that best meets your needs. Packages start at \$2500 annually and include booth space at the conference, year-round sponsorship recognition, and many other benefits. Please see the enclosed description of what is included with each level and note that booth space will no longer be offered ala carte. If you have any questions or would like to commit to a sponsorship level for 2010, please contact me. These levels will take effect January 1, 2010. Please note that there is a limit to the number of sponsorships available at some of the levels, so make sure you send your request as soon as possible. Sponsorship levels will be granted on a first come, first served basis.

In addition, by being an ACT Sponsor, we are offering opportunities exclusively for our sponsors to promote their educational webinars on the ACT website and become "Educational Partners" for an additional fee. This is a page which our members will be provided a link to and will have availability to view in order to see what educational opportunities our educational sponsor partners are offering. In addition, a link to this page will be included in our member communications which will drive members to the page on a continuous basis. If you are interested in participating or learning more about this opportunity, please contact me.

I'd like to also request that you complete a Feedback Form specifically for the Vendor Expo from the 2009 Annual Conference, if you have not already done so. Your input is very important to us. We are interested in your feedback so that we can better meet your needs and improve the event for our attendees as well. I am including an ACT Vendor Expo Feedback form for your use. Feel free to give copies of the feedback form to all who participated in your booth, including your team members that helped organize your participation, but did not attend the expo.

Additionally, there is a Speaker and Article Request Form, as well as the Vendor/Associate Member Rules of Conduct included in this packet. If you would like to be considered as a presenter at an upcoming conference or webinar or have an article featured in our eNews newsletter, please complete the enclosed form and email your request to me.

Thank you in advance for your time, effort, and support! I look forward to working closely with you again in 2010!

If you have any questions, please do not hesitate to call me at 941-727-7796 or send an email to BJameson@taxACT.org.

Very truly yours,

Brenda

Brenda Jameson, ACT
Director of Marketing and Development



The Tax Technology Association



What is ACT?

Founded in 1986 by a group of corporate tax professionals, the **Association for Computers & Taxation (ACT)** is the preeminent association for corporate tax and tax technology professionals who are interested in advancing operational effectiveness within their department through the broad use of technology. A national, nonprofit educational organization, **ACT** is designed to provide a forum for tax professionals to stay abreast of trends in technology and to learn best practices that will help today's tax departments reach new levels of operational excellence.

Why Sponsor ACT?

By becoming an ACT sponsor, you receive unprecedented benefits for 2010. ACT is sponsoring one on-site conference for 2010, but we have increased the benefits our Vendors/Associate Members can receive. The sponsorship levels begin at \$2500 and include booth space at the Annual Conference being held in Summer 2010, on-site recognition at the conference, year-round website recognition, and much more. You have the flexibility to choose the package that best meets your needs and gives you the most exposure to potential prospects.

Benefits of Sponsorship

- Build meaningful relationships through face-to-face connections and educate prospects about how you can deliver exceptional value to their tax department during the Vendor Expo at the Annual Conference.
- Receive on-site recognition at the conference for your sponsorship, as well as special recognition on the ACT website for the entire 2010 year.
- Receive an attendee list of all Annual Conference registrants.
- Participate in the Vendor Expo Passport program.
- Provide each participant with a piece of collateral in their Annual Conference materials. Some levels of sponsorship include inclusion of collateral on the conference USB drive.
- Choose a package specifically tailored to your needs and budget.
- Gain exposure to qualified leads, build your market exposure, and much more!

Sponsorship Opportunities At-A-Glance

[Click Here](#) for an Application

Package Component	Description	Diamond	Ruby	Emerald	Pearl
Price	Paid Annually	\$20,000	\$10,000	\$5000	\$2500
Limit	Number of sponsorships available	3	3	Unlimited	Unlimited
Space	Each booth is 8' deep x 10' wide	2 booths	1 booth	1 booth	1 booth
Vendor Expo Badges	Total number of representatives that can be at the booth.	6	3	3	2
Premium location	Diamond level will get first choice of booth location based on date of sponsorship application; Other levels will get to choose location based on accumulation of priority points. Selection must be made by deadline or will be assigned by ACT.	Selection Choice	Priority Points*	Priority Points*	Priority Points*
Conference attendees	Registered attendees included for the entire conference. Registration is not transferable across days.	3	2	1	
Featured Web exhibitor	Featured recognition on the ACT website	Included	Included	Included	Included
Special on-site recognition	Includes recognition signage throughout conference	Included	Included	Included	Included
Newsletter recognition	Recognition in daily conference newsletter	Included	Included	Included	Included
Company Description Word Count	The limit to the number of words that can be included in the company description used on the website and in the Vendor Expo tri-fold	100	100	75	50
Selection of break/event sponsorship	Choice of exclusive break/event sponsorship	1	1		
Vendor Expo Passport	Participation in the Vendor Expo Passport program/raffle	Included	Included	Included	Included
Gift bag drop	Ability to include a piece of collateral in each attendee conference bag	Included	Included	Included	Included
USB inclusion	Ability to include a piece of collateral electronically on the conference USB drive given to each participant	Included	Included		
Monday Lunches	Additional number of people that may participate in the ACT lunch on Monday of the conference	3	2	1	
Tuesday Networking Event	Additional number of people that may participate in the Tuesday Evening Networking Event	3	2	1	

*Priority points:

- 6 Each show the company exhibited at in last 5 years
- 1 For every booth purchased in last 5 years
- 2 For exhibit package signed and paid by January 31, 2010
- 2 For every \$5k in marketing sponsorship opportunities purchased at previous conference
- 1 For marketing sponsorship opportunities totaling less than \$5k at previous conference
- 1 For being an associate member (each member)
- 2 For completing the 2009 Annual Conference exhibitor evaluation survey prior to August 15, 2009.

Diamond Sponsorship Package

Limit: 3

Price: \$20,000

Vendor Expo

- Selection of booth location at the Monday night Vendor Expo.
- Two 8'x10' booths with draping, table, two chairs.
- Up to six individuals may participate in the booth and do not need to be conference registrants.
- 100 word limit for your company description included in the Vendor Expo tri-fold, as well as on the website.
- Participation in the Vendor Expo Passport program.

Annual Conference

- Up to three individuals may register for the conference at no additional charge. Registration includes attendance to all "open" sessions, meals, and networking events. Note: Conference registration is not transferrable across days.
- Special on-site recognition of your sponsorship.
- Recognition of your sponsorship in the daily conference newsletter.
- Inclusion of one Full-Page Ad in the Final Program.
- Dedicated sponsor signage – to be displayed in high-visibility areas within the conference facility. Diamond sponsor logo will be larger than other sponsor levels.
- General session recognition – company logo displayed on General Session welcome slide. Diamond sponsor logo will be larger than other sponsor levels.
- Ability to include one piece of collateral in each attendee conference bag – subject to approval by ACT.
- Ability to include one piece of collateral in PDF format on the conference USB drive – subject to approval of ACT.
- Up to three additional individuals may attend lunch on Monday.
- Up to three additional individuals may participate in the Tuesday evening Networking event.
- Selection of one exclusive break sponsorship. This can be the morning or afternoon break on Monday, Tuesday, or Wednesday.

Other

- Pre-conference recognition – sponsor logo will be included in select pre-conference emails.
- Website recognition – sponsor logo and link will be included on the dedicated ACT sponsorship page. Diamond logo will be larger than other sponsorship levels.
- Pre and Post-conference attendee list.

Ruby Sponsorship Package

Limit: 3

Price: \$10,000

Vendor Expo

- Selection of booth location is determined by Priority Points.
- One 8'x10' booths with draping, table, two chairs.
- Up to three individuals may participate in the booth and do not need to be conference registrants.
- 100 word limit for your company description included in the Vendor Expo tri-fold, as well as on the website.
- Participation in the Vendor Expo Passport program.

Annual Conference

- Up to two individuals may register for the conference at no additional charge. Registration includes attendance to all "open" sessions, meals, and networking events. Note: Conference registration is not transferrable across days.
- Special on-site recognition of your sponsorship.
- Recognition of your sponsorship in the daily conference newsletter.
- Inclusion of one Ad in the Final Program.
- Dedicated sponsor signage – to be displayed in high-visibility areas within the conference facility.
- General session recognition – company logo displayed on General Session welcome slide.
- Ability to include one piece of collateral in each attendee conference bag – subject to approval by ACT.
- Ability to include one piece of collateral in PDF format on the conference USB drive – subject to approval of ACT.
- Up to two additional individuals may attend lunch on Monday.
- Up to two additional individuals may participate in the Tuesday evening Networking event.
- Selection of one exclusive break sponsorship. This can be the morning or afternoon break on Monday, Tuesday, or Wednesday. Ruby selection occurs after Diamond selection has been completed.

Other

- Pre-conference recognition – sponsor logo will be included in select pre-conference emails.
- Website recognition – sponsor logo and link will be included on the dedicated ACT sponsorship page.
- Pre and Post-conference attendee list.

Emerald Sponsorship Package

Limit: Unlimited

Price: \$5,000

Vendor Expo

- Selection of booth location is determined by Priority Points.
- One 8'x10' booths with draping, table, two chairs.
- Up to three individuals may participate in the booth and do not need to be conference registrants.
- 75 word limit for your company description included in the Vendor Expo tri-fold, as well as on the website.
- Participation in the Vendor Expo Passport program.

Annual Conference

- One individual may register for the conference at no additional charge. Registration includes attendance to all "open" sessions, meals, and networking events. Note: Conference registration is not transferrable across days.
- Special on-site recognition of your sponsorship.
- Recognition of your sponsorship in the daily conference newsletter.
- Inclusion of one Ad in the Final Program.
- Dedicated sponsor signage – to be displayed in high-visibility areas within the conference facility.
- General session recognition – company logo displayed on General Session welcome slide.
- Ability to include one piece of collateral in each attendee conference bag – subject to approval by ACT.
- One additional individual may attend lunch on Monday.
- One additional individual may participate in the Tuesday evening Networking event.

Other

- Pre-conference recognition – sponsor logo will be included in select pre-conference emails.
- Website recognition – sponsor logo and link will be included on the dedicated ACT sponsorship page.
- Pre and Post-conference attendee list.

Pearl Sponsorship Package

Limit: Unlimited

Price: \$2,500

Vendor Expo

- Selection of booth location is determined by Priority Points.
- One 8'x10' booths with draping, table, two chairs.
- Up to two individuals may participate in the booth and do not need to be conference registrants.
- 50 word limit for your company description included in the Vendor Expo tri-fold, as well as on the website.
- Participation in the Vendor Expo Passport program.

Annual Conference

- Special on-site recognition of your sponsorship.
- Recognition of your sponsorship in the daily conference newsletter.
- Inclusion of one Ad in the Final Program.
- Dedicated sponsor signage – to be displayed in high-visibility areas within the conference facility.
- General session recognition – company logo displayed on General Session welcome slide.
- Ability to include one piece of collateral in each attendee conference bag – subject to approval by ACT.

Other

- Pre-conference recognition – sponsor logo will be included in select pre-conference emails.
- Website recognition – sponsor logo and link will be included on the dedicated ACT sponsorship page.
- Pre and Post-conference attendee list.

2010 Sponsorship Application

Company Information:

Company Name: _____
Contact Name: _____ Title: _____
Onsite Contact Name (if different than above): _____
Company Address: _____
City: _____ State: _____
Phone: _____ Ext: _____ Fax: _____
Email: _____
Website: _____

Product Information:

What is the nature of the product(s) or service(s) you provide?

- Income Tax Software
- Sales and Use Tax Software
- Property Tax Software
- Interest and Penalties Software
- Provision Software
- Tax Consulting Services
- Tax Software Consulting Services
- Technology Products/Services
- Other _____

Sponsorship Opportunities (available on a first come, first served basis):

- Diamond \$20,000
- Ruby \$10,000
- Emerald \$5,000
- Pearl \$2,500

Payment Information:

Total Amount: \$ _____ (Due in full with application unless other arrangements are made)

- Check
- Visa
- Mastercard
- American Express
- Other _____

Card Number: _____ Expiration Date: _____ CVV: _____

Cardholder's Name: _____

Signature: _____

This application and payment should be submitted to Donna Merritt via email dmerritt@taxACT.org, via fax to 845-987-9704 or by mail to ACT, PO Box 1093, Warwick, NY 10990.

Important Notice – Please read and sign

The Vendor/Associate Rules of Conduct apply to all activities related to the Annual ACT conference and other ACT sponsored events. These rules should be reviewed before signing below. Please also make sure that the rules of conduct are also forwarded to all ACT members, attendees, and booth representatives from your organization.

Upon signing the Application and Contract, the Sponsor acknowledges that he/she has read, understands, and will abide by the Vendor/Associate Member Rules of Conduct, which are part of this contract, and will comply with all conditions. Refunds will be made for cancellations received in writing on or before April 15, 2010, and will be subject to a cancellation penalty of 50% of the agreed sponsorship fee. Submit all requests for refunds to Donna Merritt at dmerritt@taxact.org or PO Box 1093, Warwick, NY 10990 or email to VEInfo@taxACT.org.

Signature: _____ Date: _____

ACT Vendor/Associate Member Rules of Conduct

In general, conference attendees are there to learn how to better automate corporate tax functions. Our meetings are kept informal to create an open, friendly, educational environment. ACT is a vendor-neutral organization and member and non-member attendees are encouraged to offer additional information or corrections if appropriate. Unprofessional behavior is not appropriate and will not be tolerated. Specifically:

1. The conference attendee list is provided to vendors prior to the conference for use as a reference. You may contact attendees that are already established clients of your company, however, ACT does not allow solicitation of the other attendees using this list.
2. No direct uninvited solicitation at conferences. This includes putting vendor materials or invitations under the attendee's hotel doors.
3. No signs at Registration table or around ACT conference rooms. If you have an event that you want to announce, let us know and we will post on the Announcement Board.
4. Roundtable sessions are scheduled to provide members an opportunity to discuss ideas with each other. Vendors/Associate Members are not allowed to sell or debate their solutions. If this occurs, the violating members will be asked to leave the room.
5. Vendor demo suites or other vendor functions are not allowed to be scheduled during our conference events/educational sessions. If you would like to host an event at a non-conflicting time, we would be happy to post it on the Announcement Board and/or in the daily newsletter. Additionally, ACT can provide you with the appropriate hotel contact in order to make arrangements.
6. If invited to present at a conference or a webinar, the vendor/associate member must adhere to the ACT and CPE guidelines for the session. This means that directly selling a product or service is not allowed. According to the CPE Requirements: **Sessions Must Be Based on Relevant Learning Objectives** This basically means that a "sales pitch" does not qualify for CPE credit, the intent of the presentation must be education. The materials and course must be designed specifically with education in mind. One of the ways to ensure that your course meets this requirement is to include lists of features, descriptions of features, numbers, percentages, and statistics. For example, the following two sentences say basically the same thing, but one is more salesy while the other is more educational: *More Salesy* - "Our product provides managers with the accurate and important information they need on a timely basis so that they can use that information to make business decisions and effectively run their business." *More Educational* - "Our product provides a business portal executive dashboard which constantly displays the amount of cash in the checking account; the amount of sales for the day, week, month and year; profitability ratios, live colorful growth charts, and a summary of current sales orders."
7. No verbal attacks on users of your products/services or on competitor products/services. Educational information is always welcomed, but putting another vendor down or making a user feel uncomfortable would be inappropriate. For example, berating an attendee in your hospitality suite about their choice of tax software would be grounds for termination (see below).
8. Associate Members may not attend "closed" sessions at the conference. These sessions are for Regular Members and usually entail topics that are meant to allow the members to have open, honest discussions without vendors commenting or discussing their specific solutions.

Violations Resulting in Termination:

ACT reserves the right to terminate one's participation at the scheduled event (i.e. conference, vendor expo, hospitality suite, webinar) in the event of a violation of the rules of conduct without a refund of any incurred cost or fees.

Furthermore, violation of the Vendor/Associate Member Rules of Conduct can be grounds for termination of a company's membership (entire company, not just the individual).



The Tax Technology Association

ACT CONFERENCE/WEBINAR SPEAKER AND eNEWS ARTICLE REQUEST FORM

SPEAKER AND eNEWS OPPORTUNITIES AT ACT:

As a nonprofit, educational organization, ACT greatly appreciates the time and effort that speakers and writers voluntarily put into preparing their presentations and articles. These individuals are invited as experts in their area to share information with peers on a professional level. In order to maximize the benefits its members receive, ACT organizes regular conferences and newsletters in order to share this wealth of knowledge with our membership.

If you would like to be considered as a speaker or refer a speaker for one of the ACT Conferences/Webinars or would like to have an article considered for inclusion in the newsletter, please submit the following information in an email to bjameson@taxact.org:

Your Name _____
 Company _____
 Phone _____
 Email _____

If referring a speaker:

Name of Speaker _____
 Company _____
 Phone _____
 Email _____

Presentation or Article Information:

Type – Presentation or Article
 Topic
 Title
 Brief Description
 Detailed Abstract

The Program Committee is responsible for creating the agendas for the conferences, and the Publications Committee is responsible for publishing the ACT E-Newsletter. All topic submissions will be reviewed for inclusion by the appropriate committee, as well as the ACT staff. Applications will be reviewed for content, appropriateness, educational soundness and expertise. It is important to remember that conferences are member-to-member events and members will be given preference as speakers. In addition, it is critical to the ACT membership that software vendors sponsor conference presentations. This means that the actual presentation must include a client who had a problem in which the vendor's technology supplied the solution. Vendor presentations without client representation tend to be interpreted as sales pitches or product documentations and are not well received by the membership in general. As a policy, ACT does not pay speakers or writers, waive conference fees or reimburse for travel expenses.

ACT Vendor Expo Feedback 2009 Annual Conference

Please help us make future Vendor Expos better meet your needs. Complete as best you can, involve others who were in the booth with you and your support staff; make additional copies if necessary. We want to make your next Vendor Expo experience as best as possible. You may drop feedback forms off at the Conference Registration desk or fax it to ACT at 845-987-9704.

Thank you for your time!

Event Invitation

Did the email invitation to you provide you with enough time to respond? Yes/No

If not, how could the invitation be changed to better meet your needs? Please be specific.

Vendor Expo Packet

Did the Vendor Expo Packet contain the information you needed to plan for the event? Yes/No

If not, how could the Vendor Expo Packet be changed to better meet your needs?

Hotel Staff & A/V

Were the hotel staff and A/V department helpful? Yes/No

Comments:

Expo Pipe & Drape Contractor

Was the Expo Pipe & Drape Contractor (GES Expo Services) helpful? Yes/No

Comments:
