



# TOP *of the* TABLE

ANNUAL MEETING 2014 | SAN FRANCISCO • CALIFORNIA • USA

## Sponsorship Opportunities

The Top of the Table Annual Meeting is your opportunity to be in front of an attentive, high-performing audience. This meeting provides attendees education and inspiration through the exchange of advanced sales, marketing and practice management ideas, and the development of interpersonal relationships among the world's leading financial producers.

### About MDRT

Founded in 1927, the Million Dollar Round Table (MDRT), The Premier Association of Financial Professionals®, is a global, independent association of more than 38,000 of the world's leading life insurance and financial services professionals from more than 450 companies in 74 countries. MDRT members demonstrate exceptional professional knowledge, strict ethical conduct and outstanding client service. MDRT membership is recognized internationally as the standard of excellence in the life insurance and financial services business.

MDRT's Top of the Table is an exclusive forum for the world's most successful insurance and financial services professionals. Top of the Table qualifiers are committed to providing exemplary client service while displaying the highest degrees of ethical practice and professional knowledge.

### Value beyond a booth

Our sponsorship opportunities allow your organization to have more than just a presence at the Top of the Table Annual Meeting. You are invited to attend all of the sessions and events, and have full access to Top of the Table attendees.

- Enjoy full access to the meeting
- Network and develop powerful relationships with industry leaders and top producers
- Arrange meetings with the best in the industry
- Attract new business by introducing your products and services to the world's best producers

### Attendee snapshot

The typical Top of the Table Annual Meeting attendee is like no other entrepreneur you will meet.

### 2013 meeting attendee demographics

- Members in attendance: **292**
- Total attendance including sponsors, members, spouses and guests: **545**

- U.S. attendees: **71%**
- Average commission: **USD 949,166**
- Average premium: **USD 2,760,514**
- Average income: **USD 1,459,683**
- Highly successful with extensive financial planning and advisory experience
- Serve, influence, and provide premium advice to high-net-worth clients
- Work within powerful circles
- Extremely motivated and active individuals
- Committed to continued professional development

### **Application process**

Once you receive the prospectus and agreement, please complete and return the sponsorship application, along with a 50-word description of your company and product or service, **by March 7, 2014.**

### **Basic Sponsorship Package**

**Cost: USD 10,000**

- One (1) 1-meter GEM counter with lockable storage in the ConneXion Zone®
- Two (2) bar stools
- One (1) pop-up banner – 59” x 79” with 4-color custom graphics, including stand and case (to own); high-resolution artwork due by August 1, 2014; top of booth graphic allocated to company logo and name
- Two (2) meeting registrations for company representatives, with full meeting access
- Recognition in meeting communications and promotional materials (subject to deadlines)
- Company name, contact info and logo with website listed on meeting Web page and on-site program book (subject to deadlines)
- Pre-meeting attendee list provided 30 days prior to meeting

### **Main Platform Speaker Package**

**Cost: USD 10,000 + speaker fee**

- Sponsorship of one (1) Main Platform speaker (speaker to be selected by MDRT)
- Company representative to introduce sponsored speaker (introduction to be written by MDRT)
- One (1) 1-meter GEM counter with lockable storage in the ConneXion Zone®
- Two (2) bar stools
- One (1) pop-up banner – 59” x 79” with 4-color custom graphics, including stand and case; high-resolution artwork due by August 1, 2014; top of booth graphic allocated to company logo and name; MDRT to ship materials to sponsor’s office (within the U.S.) post-meeting
- Four (4) meeting registrations for company representatives, with full meeting access
- Recognition in meeting communications and promotional materials (subject to deadlines)
- Company name, contact info and logo with website listed on meeting Web page and on-site program book (subject to deadlines)
- Pre-meeting attendee list provided 30 days prior to meeting
- One (1) complimentary *Round the Table* magazine subscription
- Logo printed on notepad in portfolio given to all attendees

### Spotlight Session Package\*

Cost: USD 20,000

- Participation in a unique presentation (Spotlight Session) illustrating how a member can incorporate your product or service into their business
- One (1) 1-meter GEM counter with lockable storage in the ConneXion Zone
- Two (2) bar stools
- One (1) pop-up banner – 59” x 79” with 4-color custom graphics, including stand and case; high-resolution artwork due by August 1, 2014; top of booth graphic allocated to company logo and name; MDRT to ship materials to sponsor’s office (within the U.S.) post-meeting
- Four (4) meeting registrations for company representatives, with full meeting access
- Recognition in meeting communications and promotional materials (subject to deadlines)
- Company name, contact info and logo with website listed on meeting Web page and on-site program book (subject to deadlines)
- Pre-meeting attendee list provided 30 days prior to meeting
- One (1) complimentary *Round the Table* magazine subscription
- Logo printed on notepad in portfolio given to all attendees

**\*Spotlight Sessions take place in meeting rooms during a Focus Session time slot at a four-session maximum.**

### Happy Hour Suite Package\*\*

Cost: USD 20,000

- Host a one-hour “Happy Hour” reception for meeting attendees, to interact, share ideas and talk more in-depth about your products and services
- One (1) 1-meter GEM counter with lockable storage in the ConneXion Zone®
- Two (2) bar stools
- One (1) pop-up banner – 59” x 79” with 4-color custom graphics, including stand and case; high-resolution artwork due by August 1, 2014; top of booth graphic allocated to company logo and name; MDRT to ship materials to sponsor’s office (within the U.S.) post-meeting
- Four (4) meeting registrations for company representatives, with full meeting access
- Recognition in meeting communications and promotional materials (subject to deadlines)
- Company name, contact info and logo with website listed on meeting Web page and on-site program book (subject to deadlines)
- One (1) complimentary *Round the Table* magazine subscription
- Logo printed on notepad in portfolio given to all attendees

**\*\* Four (4) sponsor maximum. Note: *Décor and food are the responsibility of the sponsor.***

### Wi-Fi Package\*\*\*

Cost: USD 15,000

- Sponsorship of one (1) day of Internet access for all Top of the Table Annual Meeting attendees
- Recognition signage and promotional slide on the Main Platform
- One (1) 1-meter counter with lockable storage in the ConneXion Zone®
- Two (2) bar stools
- One (1) pop-up banner – 59” x 79” with 4-color custom graphics, including stand and case; high-resolution artwork due by August 1, 2014; top of booth graphic allocated to company logo and name; MDRT to ship materials to sponsor’s office (within the U.S.) post-meeting
- Two (2) meeting registrations for company representatives, with full meeting access
- Recognition in meeting communications and promotional materials (subject to deadlines)

- Company name, contact info and logo with website listed on meeting Web page and on-site program book (subject to deadlines)
  - One (1) complimentary *Round the Table* magazine subscription
  - Logo printed on notepad in portfolio given to all attendees
- \*\*\* Four (4) sponsor maximum for daily sponsorship (Wednesday, Thursday, Friday or Saturday).**  
**Sponsors may request an exclusive sponsorship.**

The sponsorship selection process begins **March 14, 2014**. The Top of the Table Industry Relations Committee will review and approve submissions after this date. Approved sponsors will be notified in writing. Mail or fax your sponsorship application, including company and product description, to:

Million Dollar Round Table  
Attn: Diane Waligurski, MDRT Meeting Planner  
325 West Touhy Avenue  
Park Ridge, IL 60068 USA  
+1 847.993.4921  
dwaligurski@mdrt.org

### **2013 Top of the Table Sponsors**

Agency ONE  
Allianz Life  
AVIVA USA  
AXA Equitable  
Clarity 2 Prosperity Advisory Group  
Columbus Life Insurance Company  
Coventry  
Crump Life Insurance Services  
Dressander & Associates Inc.  
Financial Independence Group (FIG)  
First Heartland Capital Inc.  
John Hancock  
LifePro Financial Services Inc.  
Lincoln Financial Group  
Matson Money  
MetLife  
NFP  
Prudential Financial Inc.  
S&P Indices



**2014 Top of the Table  
Annual Meeting – September 17–20, 2014  
The Fairmont San Francisco, San Francisco, California, USA**

**SPONSORSHIP AGREEMENT**

**Contact for Correspondence:** The person listed as “contact” will receive all correspondence regarding the meeting. (Please print or type.)

Contact: \_\_\_\_\_ Title: \_\_\_\_\_

Company: \_\_\_\_\_ Web address: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Email: \_\_\_\_\_

Name of company representative who should appear in the program book:  
\_\_\_\_\_

Please identify the primary product or service your company provides:  
\_\_\_\_\_

On a separate sheet of paper, please provide a brief description of your services (50 words or less). The description will appear in the on-site program book. **(Please submit by March 7, 2014.)**

**Sponsorship Packages:**

- Basic Sponsorship Package – USD 10,000
- Main Platform Speaker Package – USD \_\_\_\_\_
- Spotlight Session Package – USD 20,000
- Happy Hour Package – USD 20,000
- Wi-Fi Package:  All Four (4) Days – USD 30,000     One (1) Day – USD 15,000

**Payment** (Upon notification of acceptance, full payment is required within 10 business days.):

My check to MDRT in USD funds is enclosed. Check number: \_\_\_\_\_

Please charge the sponsorship fee of USD \_\_\_\_\_ to my credit card:

American Express     Visa     MasterCard    Card number: \_\_\_\_\_

Expiration date: \_\_\_ / \_\_\_ (mm/yy)    CVV # \_\_\_ \_\_\_

Cardholder’s name (as it appears on card): \_\_\_\_\_

Cardholder’s signature: \_\_\_\_\_

Cardholder’s billing address:     Same as above

Other: \_\_\_\_\_

Bank/Wire transfer: JP Morgan Chase Bank for credit to: Million Dollar Round Table  
ABA #021000021 Account #644315228 Swift Code: CHASUS33

**Authorized signature:** \_\_\_\_\_

**Send application and payment to:**

Attn: Diane Waligurski, MDRT meeting planner, Million Dollar Round Table, 325 West Touhy Avenue, Park Ridge, IL 60068 USA. You may also fax credit card payment and completed application to +1 (847) 518-8921.

**ADDITIONAL SIGNATURE REQUIRED ON NEXT PAGE**

## **TOP OF THE TABLE ANNUAL MEETING SPONSORSHIP AGREEMENT REGULATIONS**

This is an official contract between MDRT and the Sponsor for the purpose of securing a defined Sponsorship for the 2014 Top of the Table Annual Meeting in San Francisco, California, USA. The signed application will serve as valid booking order. Sponsorship benefits and deadlines are defined in the "Sponsorship Opportunities" document. No other benefits are guaranteed or implied. Once the application is signed and payment is received by MDRT, sponsorships cannot be cancelled. Both parties must agree to any revisions or modifications to the contract in writing.

The sponsor regulations set forth below are a binding part of your application and contract with Top of the Table. We request that you review these sponsor regulations thoroughly to help ensure you make the most out of the Top of the Table Annual Meeting. Any matters regarding these regulations and your compliance with them shall be determined by MDRT in its sole and absolute discretion.

### **IMPORTANT NOTE REGARDING EXHIBITING IN THE CONNEXION ZONE®:**

Please be advised that pre-fabricated exhibit booth structures of any kind will not be permitted in the ConneXion Zone®.

### **ATTENDANCE AND SUITCASING**

Sponsors attending the Top of the Table Annual meeting will be granted access to all Top of the Table meeting functions. Any attendee or Sponsor who is observed to be soliciting business in public space, in another company's booth or in violation with any part of the Sponsor Contract will be subject to penalty. MDRT recognizes that suit casing may also take the form of commercial activity conducted in a hotel guest room or hospitality suite, a restaurant, club or any other public place of assembly. For the purposes of this policy, suit casing violations may occur at venues other than the ConneXion Zone and at other events. Please report any violations you may observe to MDRT staff.

### **ENDORSEMENTS**

MDRT and Top of the Table do not approve, endorse or recommend the use of any specific commercial product or service except by express written approval by its Executive Committee. The Sponsor shall not imply verbally, in printed literature or otherwise that the Sponsor's products or services are approved, endorsed or recommended by MDRT or Top of the Table. No material can be printed using the name MDRT or Top of the Table so that it implies authorship or endorsement by MDRT or Top of the Table.

### **SOLICITATION/RECRUITING**

No solicitation of products/services shall be made outside of the Sponsor's booth space. In the event someone from the Sponsor's organization is speaking during the Top of the Table Annual Meeting, it is vital that such person be made aware that no reference of any kind can be made during his or her presentation regarding the products/services available at the booth or that he or she has a booth, except during purchased Spotlight Sessions. Recruiting or attempted recruiting of personnel or agents is not permitted during the meeting. Sponsor shall not use any Top of the Table membership list or MDRT Sponsor list for solicitation purposes without the express written consent of Top of the Table.

### **SPONSORS WHO ARE CURRENT TOP OF THE TABLE MEMBERS**

Sponsors who are also current Top of the Table members must also be registered to attend the meeting as a Top of the Table member. Registration fees are the responsibility of the Top of the Table member.

### **HOTEL ACCOMMODATIONS**

Hotel reservations are the responsibility of the Sponsor.

### **SPOUSE AND CHILDREN ATTENDEES**

Spouses of Sponsors must be registered as a Sponsor if they wish to attend the meeting. Children are not permitted at the Top of the Table Annual Meeting.

### **CANCELLATION**

**No refunds will be given for cancellations after receipt of the completed application and full payments have been received.** In the event of cancellation of all or part of the Sponsorship due to fire, earthquake, flood, epidemic, strike, government regulation or other causes beyond Top of the Table's control, Top of the Table shall not be held liable for failure to fulfill the meeting Sponsorship as scheduled and Top of the Table shall, in its sole discretion, determine the amount, if any, of sponsorship fees to be refunded. All decisions regarding compliance with the Sponsorship regulations shall be determined by Top of the Table in its sole and absolute discretion.

### **INDEMNIFICATION**

The Sponsor agrees to indemnify and hold harmless Top of the Table from and against all claims, actions or causes of action, liabilities, including reasonable attorneys' fees and cost arising from the defense of any claim, action, cause of action or liabilities arising out of or resulting from any action or omitted by the sponsor or the agents pursuant to the performance of sponsor obligations hereunder. The performance of this agreement by either party is subject to acts of God, war, terrorism, governmental regulations, disaster, strikes, civil disorder, curtailment of transportation facilities, or other emergency or event that makes performance inadvisable, impossible and/or illegal. The Sponsor understands that Top of the Table does not maintain insurance covering the sponsor's property and it is the sole responsibility of the Sponsor to obtain such insurance. The application represents the entire understanding agreement of the parties and shall be governed by the laws of the State of Illinois, USA. Any person executing this agreement represents that he or she is fully authorized to do so and agrees to be bound to all terms and conditions.

**Authorized signature:** \_\_\_\_\_

**Signature indicates full understanding and agreement to the terms and conditions described.**