



SPONSORSHIP PROSPECTUS

October 2-4
Wyndham Grand Clearwater Beach

WELCOME

The DAF Giving Summit is the only industry event of its kind, bringing charitable giving into the modern era by sharing best practices, showcasing new technologies, and more. Thank you for sponsoring this important industry event and joining the community that is reimagining the future of philanthropy...

When

October 2-4, 2023

Where

Wyndham Grand Clearwater Beach
Clearwater, FL

What

An immersive learning and networking experience about the current and future philanthropic landscape.

Why Sponsor

As a sponsor, you get ample opportunity to network with thought leaders in wealth management and charitable giving as well as access to information about the latest innovations and developments in the industry.





ABOUT THE SUMMIT

Attendees

- Financial and tax advisors
- Technology and service providers that support the charitable giving economy
- Wealth managers
- Executives and program leaders from large financial institutions
- Family office staff
- Executives and leaders from nonprofits

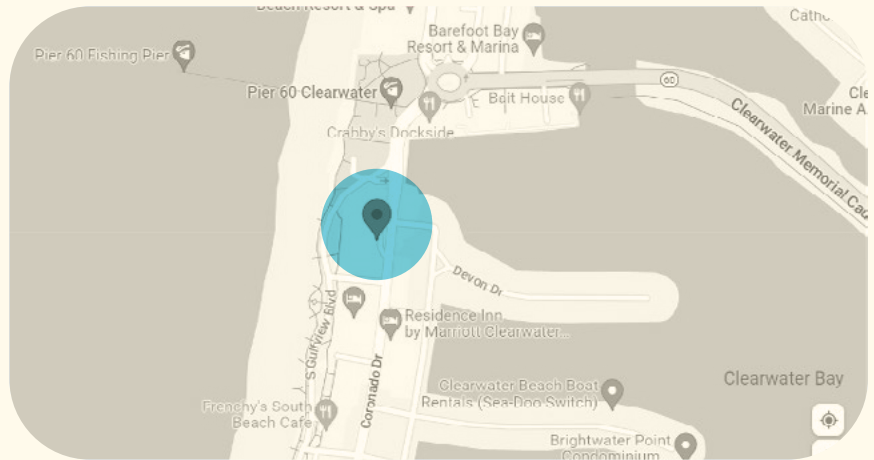
Content

This immersive two-day learning experience gives attendees the chance to network with thought leaders in wealth management and charitable giving, discover the latest innovations and developments in the industry, and reimagine their philanthropic strategy. A wide array of subjects will be covered and created to bring charitable giving into the modern world with content tracks covering topics like trends, legislation and regulation, innovation, operations, and advisor stories.

We are excited to announce that a DAF Specialist certification will be available exclusively to attendees. This certification is designed to complement the Chartered Advisor in Philanthropy designation.

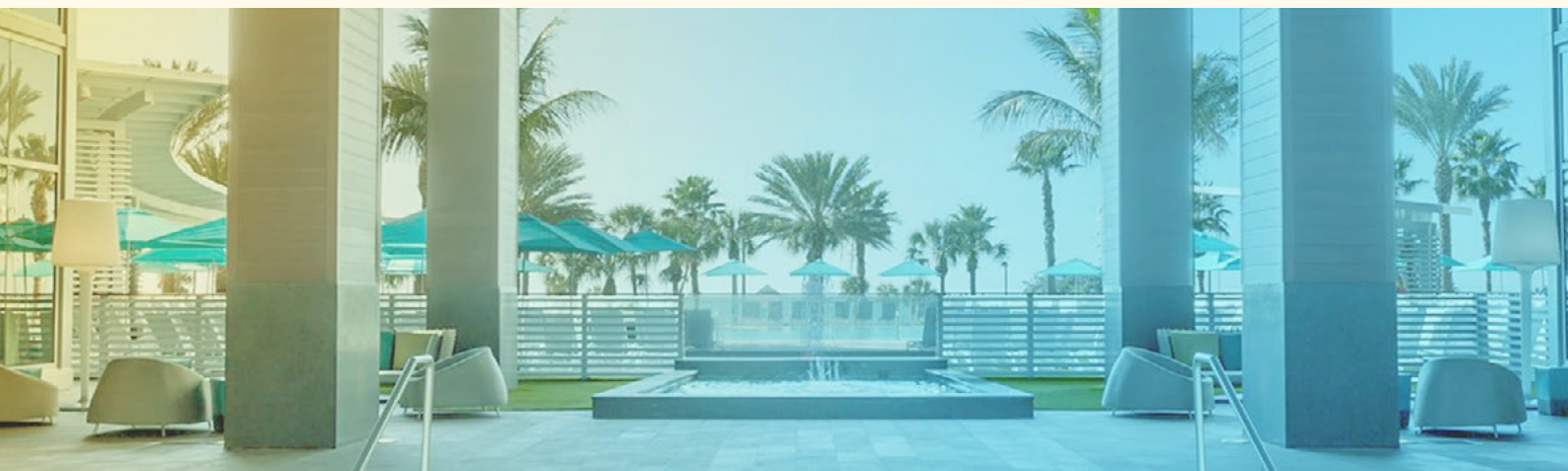
Hotel Location

Wyndham Grand
 100 Coronado Drive
 Clearwater Beach, FL 33767
 Reservation Desk: 727-281-9500



Exhibitor Hours (all times EST)

- Monday, October 2, 1:00 PM – 5:00 PM _____ Exhibitor Set Up
- Tuesday, October 3, 7:30 AM – 5:00 PM _____ Exhibitor Hours
- Wednesday, October 4, 7:30 AM – 12:00 PM _____ Exhibitor Hours
- Wednesday, October 4, 12:00 PM – 2:00 PM _____ Exhibitor Move Out





ABOUT THE SUMMIT

Space Assignment

Exhibit space is available based on sponsor level and selected on a first-come, first-served basis and includes one 6-ft. skirted table and two chairs.

Space Guidelines

Exhibits are for the dissemination of information and displaying items that can easily fit within the allotted tabletop exhibit space.

Guidelines:

1. Display materials should be arranged in a way that doesn't obstruct sight lines of neighboring exhibitors.
2. Maximum height of display material on the table may not exceed 7 feet
3. Displays cannot wrap around to produce any type of sidewall.
4. All exhibitors must keep their materials within their exhibit space.
5. Portable, pop-up back walls are permitted in the back of table space and are subject to placement approval.
6. Furniture and technology rental will be available at the venue. Please reach out if you're interested.

YOU ARE REQUIRED TO NOTIFY THE EXHIBITS MANAGER IF YOU ARE BRINGING IN EQUIPMENT AND INCLUDE SIZE OF MATERIALS.

We will not provide storage for empty containers and boxes. All containers and boxes not on display must be stored out of sight within the exhibitor's table space. All exhibits are subject to review onsite and modification where necessary. Custom built table displays are strictly prohibited.

To eliminate any package delays, please utilize the addressing instructions below. Our Shipping & Receiving Department handles all packages shipped to the event space. All packages received by the hotel require a signature release before leaving the Shipping & Receiving Department's custody. Release signatures are captured at the time of package pickup or during delivery to the recipient. Inbound receiving and handling fees will be applied to all package(s). Fees applied are in addition to standard shipping rates. It is a one-time fee based on the weight of each individual package.

Use only the individual's guest name that will be on-site to sign for the package(s). Please DO NOT address your packages to a hotel employee or event manager, as this could cause the package to be delayed.

To ensure proper delivery time for your event, please schedule your package to be delivered to the hotel one day, but no earlier than 3-5 days, prior to the start of your event. Packages scheduled to be delivered on the day of your event may cause a delivery delay.

When shipping materials to the hotel, please include the following information on all packages to ensure proper delivery and storage.

Wyndham Grand
100 Coronado Drive
Clearwater Beach, FL 33767
Conference Name: DAF Giving Summit
Event Dates: October 2-4, 2023
Client / Guest Name: Your Name
Client Phone: Your Phone #
Hold for Arrival: Your Arrival Date
Package # of #

****Please note that additional processing fees may be charged by the hotel.****



PAYMENTS & CANCELLATIONS

Payment Schedule

Full payment and company information is due with the application form. Contracts submitted without payment are not binding, and space will not be assigned or held.

Cancellation Policy

Cancellation of sponsorship must be submitted in writing. Cancellations will not be taken over the phone. Cancellations received prior to August 2, 2023, will forfeit 85% cancellation fee. Sponsors canceling space on or after August 2, 2023, will forfeit 100% of the sponsor fee.

Payment Methods

The DAF Giving Summit accepts payments through checks and electronic bank transfers. Please contact sponsors@dafgivingsummit.com for payment instructions.

Accommodations

The DAF Giving Summit will be hosted at Wyndham Grand Clearwater Beach. Group rates are available for attendees and sponsors. To take advantage of the group rate, **please make reservations no later than 5:00 PM (EST) on Monday, September 11, 2023.**

Reservations received after the above date will be accommodated based on availability at the published rate. We have made every effort to ensure the housing block is large enough to accommodate all attendees; however, we strongly advise that you make all reservations as early as possible.

Important Dates

June 9 _____	Sponsor Registration Opens
September 11 _____	Last Day to Make Hotel Reservations
September 15 _____	Last Day to Provide Company Info
October 2 _____	Exhibitor Setup
October 2 _____	DAF Giving Summit Begins
October 4 _____	DAF Giving Summit Ends



RULES & REGULATIONS

General Terms & Regulations

1. These rules and regulations constitute an essential part of the contract for the exhibit space. During the exhibit, DAF Giving Summit reserves the right to render all interpretations and to establish further regulations as may be deemed necessary for the general success of the exhibition.
2. DAF Giving Summit reserves the right to decline, prohibit or expel an exhibit which, in its judgment, is out of keeping with the character of the exhibition, this reservation being all-inclusive as to person, things, printed matter, product, conduct, etc. Should the exhibit be expelled, space payments will not be refunded.
3. Exhibitors shall be bound by all pertinent laws, codes, and regulations of municipal or other authorities having jurisdiction over the exhibit facility or the conducting of said exhibit, together with the rules and regulations of the owners and/or operators of the facility in which the exhibition is held.
4. It is agreed that if the exhibitor fails to comply in any respect with the terms of the agreement, then DAF Giving Summit shall have the right, without notice to the exhibitor, to cancel their space and sell or offer for sale, the exhibit space covered by this contract, said exhibitor to be liable for any deficiency, loss, or damage suffered by the exhibition by reason of the premises stated, which loss or damage the exhibitor agrees to pay the exhibition upon demand together with reasonable expenses and costs incurred by reason thereof.
5. It is further agreed that actual occupation of the exhibit space by an exhibit is of the essence thereof, and that should the exhibition be unable to affect the sale of the space as herein provided, the exhibition is then expressly authorized to occupy or cause said space to be occupied in such manner as it may deem in the best interest of the exhibition, without any rebate or allowance whatsoever to the exhibitor and without in any way releasing said exhibitor from any liability hereunder and said exhibitor expressly agrees to pay the exhibition the full sum therein forth.
6. DAF Giving Summit shall have full power in the interpretation and enforcement of all rules and regulations contained herein and the power to make such amendments thereto, and such further rules and regulations as it shall consider necessary for the proper conduct and success of the exhibition.
7. I understand that by providing my mailing address, email address, telephone number, and fax number, I consent to receive communications sent by or on behalf of DAF Giving Summit and their subsidiaries and affiliates via regular mail, email, telephone, or fax. I understand that DAF Giving Summit may share my address/email/telephone/fax with other organizations.

Violations

Specific actions may be taken by DAF Giving Summit for violation of provision of these guidelines. Violations of any DAF Giving Summit policies, rules, or regulations may result in immediate removal from the exhibit hall and or denial of sponsorship at future meetings. The action taken will be determined on the basis of the particular circumstances of the violations but in cases involving major violations, may include legal action.

Access to Exhibits

Exhibitors may not enter another exhibitor's booth; take literature, or photographs without approval.

RULES & REGULATIONS

Care of Facility

Protection of convention facility property: Nothing shall be posted on, or tacked, nailed, screwed, or otherwise attached to the columns, walls, floors, or other parts of the facility or convention hall exhibit area without permission from the proper building authority.

Catastrophe

DAF Giving Summit will not be liable for the fulfillment of this contract as to the delivery of exhibit space if non-delivery is due to any of the following causes:

By reason of the facility being damaged or destroyed by fire, an act of God, public enemy, war or insurrections, strikes, the authority of the law, postponement or cancellation of the exposition, or for any cause beyond their control. It will, however, in the event of its not being able to hold an exhibit for any of the above-named reasons, reimburse exhibitors on a pro-rata basis on any amount paid in, less any and all legitimate expenses incurred, such as but not limited to rent, advertising, salaries, operating costs, etc.

Floor Covering

The DAF Giving Summit exhibit hall has carpet and companies are prohibited from providing their own floor covering.

Hanging Signs

Hanging signs are strictly prohibited within the exhibit area.

Duty of Care

As an attendee of the DAF Giving Summit you are responsible for your health and to make the event staff aware of your current health conditions. Please do not attend the meeting if you are experiencing any of the following:

- A fever (>100°F) or a sense of having a fever
- A new cough that you cannot attribute to another health condition
- Shortness of breath that you cannot attribute to another health condition
- The loss of taste or smell
- Chills you cannot attribute to another health condition
- A sore throat that you cannot attribute to another health condition
- New muscle aches (myalgia) that you cannot attribute to another health condition

Acknowledgment

Due to the nature of infectious diseases like COVID-19 and their presence in society, no physical environment is free of the risk of transmission. The rules and guidelines communicated by DAF Giving Summit can mitigate but cannot eliminate this risk. Registered attendees acknowledge they are responsible for checking the event website and their email for communications regarding any changes to the current guidelines for this event.



RULES & REGULATIONS

Insurance Certificates (EACs)

Exhibitors may be required to secure (or maintain) a public liability insurance policy acceptable to DAF Giving Summit as to coverage limits and agrees to name DAF Giving Summit as an additional insured on any such policy(ies). Exhibitor shall furnish a certificate of insurance no later than August 2, 2023, showing DAF Giving Summit named as an additional insured, and exhibitor, upon demand, agrees to furnish DAF Giving Summit proof of payment of the premium on any such policy(ies). Policy(ies) shall expressly provide that the policy(ies) shall not be canceled or altered without at least 10 days prior written notice to DAF Giving Summit from the insurance company. Sponsor expressly agrees to indemnify and hold harmless DAF Giving Summit, its management, agents, and employees from any and all liability, claims, loss damages, or expenses, including counsel fees and costs resulting from injuries to any person, including other exhibitors, the agents, employees and attendees, or damage to any property, including property owned by the exhibitors, in connection with its use of exhibit space. Exhibitor agrees that the exhibition assumes no responsibility for the safety of employees from theft, damage by fire, accident, or any other cause whatsoever. The exhibition will have the doors secured/locked during non-exhibiting hours; however, attention is called to the necessity for insurance covering all risks (liability, fire, theft, damage, etc.) on your exhibit from place of shipment to the exhibition facility, return, and during the exhibition.

Host Hotel/Insurance: Sponsor expressly agrees to adhere to all convention rules and regulations published by the hotel. Sponsor also agrees to meet all hotel insurance requirements and accepts sole and complete responsibility for securing required license/permits needed, for example, from ASCAP/BMI for the use of music in booth area.

Insurance certificates must be sent to sponsors@dafgivingsummit.com no later than August 2, 2023. DAF Giving Summit must be listed as a coinsured on the certificate.

Certificate Holder: DAF Giving Summit, P.O. Box 65, Caledonia, WI 53108

Installation of Exhibits (all times EST)

Installation hours: 1:00 PM – 5:00 PM, Monday, October 2, 2023. All exhibit boxes must be empty and stowed under the tabletop exhibit no later than 5:00 PM. Display space not claimed and occupied by 5:00 PM will be canceled or reassigned without notification or refund.

If the exhibit is on hand, DAF Giving Summit reserves the right to assign labor to set up any display that is not in the process of being erected by 5:00 PM on October 2, 2023, and/or order the removal of all display materials not in the process of being set by 5:00 PM on October 2, 2023.

The charge for labor to complete either of these options will be billed to the exhibitor and DAF Giving Summit shall have no liability for such work. Labor within the booth can be provided either through an exhibitor, appointed contractor, or the official service provider. All individuals working in the hall must be badged.

Packing, unpacking, and assembly of exhibits shall be done only in designated areas and in conformity with the directions of the convention hall manager or their assistants. All booths must be set up no later than 5:00 PM, Monday, October 2, 2023.



RULES & REGULATIONS

Outstanding Balance / Payment Information

Companies that have a past balance due with DAF Giving Summit will not be permitted to exhibit until the balance is paid in full.

Promotional Material

Sponsors may not use the name or logos of DAF Giving Summit in promotional material without written consent. While at the exhibition, distribution of advertising material and exhibitor solicitation of any sort shall be restricted to the exhibitor's booth. Neither company's exhibits nor products may extend into the aisle or beyond the limits of the assigned booth.

Any promotional activity performed by the exhibitor outside the confines of the assigned booth, including promotional activities outside the confines of the meeting facility, requires preapproval by DAF Giving Summit. This includes, but is not limited to, the use of promotional materials such as billboards, street solicitors, taxi cabs, and mobile billboards. DAF Giving Summit reserves the right to require exhibitors to cease unapproved promotional activities. Continuation of this activity after notification to desist may result in expulsion from the meeting and denial of participation in future meetings. DAF Giving Summit is not responsible for any reimbursement of ceased activities or lost expenses of any kind.

Professional Behavior

Professional behavior is expected by each sponsor and its representatives at all times during the DAF Giving Summit. Any provocation of another either verbally, physically, or by any other means will result in all parties involved surrendering their badges immediately and being escorted off the premises by security and all parties being prohibited from attending the remainder of the DAF Giving Summit. If there is more than one offense, DAF Giving Summit will prohibit the parties' attendance at ALL future DAF Giving Summit events.

Selling

Selling or order taking is permitted, but sponsors are expected to maintain proper decorum, follow DAF Giving Summit's high standards, and be consistent with the educational purposes and integrity of the show and profession. Exhibitors must obtain any/all permits/licenses required by the host state/city prior to selling/taking orders on-site. All taxes related to sales/orders on site are the sole responsibility of the exhibitor.

External Events

Sponsors are encouraged to network with attendees but are prohibited from hosting an external event during planned DAF Giving Summit events. The DAF Giving Summit planning committee purposefully excluded dinners from the planned events so that sponsors could take advantage of that time to further network with attendees.

Registrations

Most sponsorships include complimentary event registration(s). Each complimentary registration is intended to be used by one individual and cannot be shared by two or more individuals.

Attendee Lists

Sponsors will have access to reach out to attendees through the mobile application and will not receive a separate attendee listing.



CONTACT



SPONSORSHIPS

KELLY PALMER

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GENERAL INQUIRIES

MONA HALL

planningteam@dafgivingsummit.com



PROGRAMMING

GIDEON TAUB

programming@dafgivingsummit.com

