Sponsor & Exhibitor Prospectus

NINTH ANNUAL



SPECIAL NEEDS PLANNING S Y M P O S I U M MOVING TO MASTERY

FEBURARY 6-8, 2025 MERITAGE RESORT & SPA I NAPA, CA

WWW.SNTSYMPOSIUM.COM

When & Where



MERITAGE RESORT & SPA

870 Bordeaux Way Napa, California 94558 (855) 318-1768

EXHIBIT DATES/TIMES

Setup: Wednesday Afternoon, February 5

February 6 **Thursday** February 7 **Friday** February 8 **Saturday**

9:00 a.m.– 5:30 p.m. 7:00 a.m.– 6:30 p.m. 7:30 a.m.– 12:30 p.m.

Teardown: Any time after 11:45 a.m. on Saturday, February 8, 2025



A Message from Your Hosts

We are thrilled to present the 9th Annual Special Needs Planning Symposium. We will return to Napa and the beautiful Meritage Resort and Spa for the 2025 SNT Symposium. We anticipate 400 attendees in-person and another 100-200 attendees virtually. You can interact with attendees in-person and through the virtual platform.

We invite you to join us as a sponsor or exhibitor as we return to meeting together once again. I look forward to sharing some great food and wine as we continue to raise the bar of knowledge around Special Needs Trusts in California.



Why Sponsor the Special Needs Planning Symposium

Unparalleled Networking: Connect around 500 professionals, including attorneys, private fiduciaries, financial advisors, and industry leaders across California and the country. This symposium provides an incredible platform to build new relationships, forge partnerships, and collaborate with the best in the field of special needs planning. Seize this chance to expand your network and position your brand as a leader in this thriving community. Welcome to the Special Needs Planning Symposium, the premier gathering for professionals specializing in planning for individuals and families with special needs. This year, we are thrilled to invite you to join us at the luxurious Meritage Resort and Spa in beautiful Napa, California. Here is why sponsoring this exceptional event is an opportunity you will not want to miss:

Showcasing Expertise: As a sponsor, you can showcase your organization's expertise at a world-class conference. Present your innovative solutions, products, and services to a highly engaged audience eager to learn, connect, and share their experiences. By demonstrating your thought leadership and deep commitment to special needs planning, you establish your brand as a trusted authority in the industry.

Leadership Recognition: Share your passion and dedication with colleagues and industry professionals who attend the Symposium. By aligning your brand with this significant event, you demonstrate your commitment to advancing the field of special needs planning. Be a catalyst for change, lead the conversation, and shape the future of this vital area of practice.

Join us as a sponsor or exhibitor at the Special Needs Planning Symposium, and together, let us make this the most remarkable conference yet. Your participation will contribute to the growth and advancement of special needs planning while elevating your brand's visibility and impact in this dynamic industry. Do not miss out on this unparalleled opportunity to connect, learn, and thrive. **Enjoyment and Profitability**: Our experienced hosts understand what it takes to make a conference successful for sponsors and exhibitors. They go above and beyond to ensure that your experience is not only productive but enjoyable as well. Take advantage of this opportunity to have a memorable and profitable time while connecting with like-minded professionals and fostering fruitful partnerships.

Who Attends the Conference?

2024 STATISTICS **ATTENDEES IN-PERSON** VIRTUAL Attorneys 190 Professional Fiduciaries 159 Special Needs Planning Professionals 90 Financial Advisors 64 Professional Fiduciary Financial Advisor Other Attorney 500 400 300 200 100 0 2017 2018 2019 2020 2021 2022 2023

96% of exhibitors want to return for 2025 "I thought the 2024 SNP Symposium was great. I met a lot of curious and engaging individuals who could potentially be new clients or vendors that we could potentially work with."

2024 Exhibitor

Diamond Sponsor

SOLD OUT

\$15,000 | One Available

- Designation as Diamond Sponsor on Conference Promotional Materials
- Designation as a Diamond Sponsor on the Symposium Website Home Page with Link
- · Designation as a Diamond Sponsor on Marketing Emails
- One Exhibit Table First Choice of Placement with Complimentary Power
- Access for Five (5) Conference General Sessions, Including All Meals and Events
- Exclusive Sponsor of Friday Night Strolling Dinner Event
- Five-minute Address to Attendees
- Logo on All Attendee Name Badges
- Branded Item Included in Conference Attendee Kit and Welcome Packet
- Front Full-Page Ad in Print and Symposium Resource Booklet Distributed to Attendees
- Acknowledgment as Diamond Sponsor During Breaks and Separate Breakouts
- Prominent and Exclusive Signage at Event Venue During Event
- Participation in Passport Event to drive attendees to the in-person booth
- Participation in Gamification Driving Attendees to Sponsor Website
- Opportunity for Digital Lead Retrieval
- Electronic Registered Attendee List with Permission For one Pre and one Post Event Email to Attendees
- Specially Designed Digital Exhibitor Page to be Visited by Attendees (Virtual Attendees)

Platinum Sponsor

SOLD OUT

\$13,000 | One Available

- Designation as Platinum Sponsor on Conference Materials
- Designation as a Platinum Sponsor on the Symposium Website Home Page with Link
- Designation as a Platinum Sponsor on Marketing Emails for the Program
- One Exhibit Table Including Complimentary Power in Premium Location
- Five-minute Address to Attendees
- Access to Four (4) Conference General Sessions Including All Meals and Events
- Exclusive Host of Thursday Evening Welcome Cocktail Reception
- Branded Item Included in Conference Attendee Kit and Welcome Packet
- Full-Page Ad in Printed and Symposium Resource Booklet Distributed to Attendees
- Acknowledgment as Platinum Sponsor from Podium and Separate Breakouts
- · Participation in Passport Event to drive attendees to in-person booth
- Participation in Gamification Driving Attendees to Sponsor Website
- Opportunity for Digital Lead Retrieval
- Electronic Registered Attendee List with Permission for one Pre and one Post Event Email to Attendees
- Specially Designed Digital Exhibitor Page to be Visited by Attendees (Virtual Attendees)

Lanyard Sponsor

SOLD OUT

\$10,000 | One Available

- Logo on Symposium lanyard distributed to all Attendees
- Designation as Lanyard Sponsor on Conference Materials
- Designation as a Lanyard Sponsor on the Symposium Website Home Page with Link
- Designation as a Lanyard Sponsor on Marketing Emails for the Program
- One Exhibit Table with Complimentary Power
- Access to Three (3) Conference General Sessions Including All Meals and Events
- Branded Item Included in Conference Attendee Kit
- Full-Page Ad in Print and Symposium Resource Booklet Distributed to All Attendees
- Participation in Passport Event to drive attendees to in-person booth
- Participation in Gamification Driving Attendees to Sponsor Website
- Opportunity for Digital Lead Retrieval
- Electronic Registered Attendee List with Permission For one Pre and one Post Event Email to Attendees
- Specially Designed Digital Exhibitor Page to be Visited by Virtual Attendees

PowerPoint Sponsor SOLD OUT

\$10,000 | One Available

- Logo on Symposium PowerPoint Used in All Sessions
- Designation as PowerPoint Sponsor on Conference Materials
- Designation as PowerPoint Sponsor on the Symposium Website Home Page with Link
- Designation as a PowerPoint Sponsor on Marketing Emails for the Program
- One Exhibit Table with Complimentary Power
- Access to Three (3) Conference General Sessions Including All Meals and Events
- Branded Item Included in Conference Attendee Kit
- Full-Page Ad in Print and Symposium Resource Booklet Distributed to All Attendees
- Participation in Passport Event to drive attendees to in-person booth
- Participation in Gamification Driving Attendees to Sponsor Website
- Opportunity for Digital Lead Retrieval
- Electronic Registered Attendee List with Permission For one Pre and one Post Event Email to Attendees
- Specially Designed Digital Exhibitor Page to be Visited by Virtual Attendees

Online Streaming & App Sponsor

SOLD OUT

\$10,000 | One Available

- Logo on Conference Application
- Logo for Online Streaming Attendees Between Sessions and During Break for Two and a Half Days
- Designation as Online Streaming Sponsor on Conference Materials
- Designation as Online Streaming Sponsor on the Symposium Website with Link
- Designation as Online Streaming Sponsor on Marketing Emails for Program
- One Exhibit Table with Complimentary Power
- Access to Three (3) Conference General Sessions Including All Meals and Events
- Branded Item Included in Conference Attendee Kit
- Full-Page Ad in Symposium Resource Booklet Distributed to All Attendees
- Participation in Passport Event to drive attendees to in-person booth
- Participation in Gamification Driving Attendees to Sponsor Website
- Opportunity for Digital Lead Retrieval
- Electronic Registered Attendee List with Permission For one Pre and one Post Event Email to Attendees
- Specially Designed Digital Exhibitor Page to be Visited by Virtual Attendees

Key Card Sponsor SOLD OUT

\$10,000 I One Available

- Logo on Hotel Key Cards for Event
- Designation as Key Card Sponsor on Conference Materials
- Designation as Key Card Sponsor on the Symposium Website with Link
- Designation as Key Card Sponsor on Marketing Emails for the Program
- One Exhibit Table with Complimentary Power
- Access to Three (3) Conference General Sessions Including All Meals and Events
- Full-Page Ad in Symposium Resource Booklet Distributed to All Attendees
- Participation in Passport Event to drive attendees to in-person booth
- Participation in Gamification Driving Attendees to Sponsor Website
- Opportunity for Digital Lead Retrieval
- Electronic Registered Attendee List with Permission For one Pre and one Post Event Email to Attendees
- Specially Designed Digital Exhibitor Page to be Visited by Virtual Attendees

Gold Sponsor

\$8,500 | Four Available - One Left

- Designation as Gold Sponsor on Conference Materials
- Designation as a Gold Sponsor the on the Symposium Website with Link
- Designation as a Gold Sponsor on Marketing Emails for the Program
- One Exhibit Table with Complimentary Power
- Access to Three (3) Conference General Sessions Including All Meals and Events
- Half-Page Ad in Symposium Resource Booklet Distributed to All Attendees
- Sponsor's Marketing Materials Distributed to All Attendees in Welcome Packet
- Participation in Passport Event to drive attendees to in-person booth
- Participation In Gamification Driving Attendees to Sponsor Website
- Electronic Registered Attendee List with Permission For one Pre and one Post Event Email to Attendees
- Specially Designed Digital Exhibitor Page to be Visited by Attendees (Virtual Attendees)

Silver Sponsor

\$7,500 | Five Available - Four Left

- Designation as Silver Sponsor on Conference Materials
- Designation as a Silver Sponsor on the Symposium Website with Link
- Designation as a Silver Sponsor on Marketing Emails for the Program
- One Exhibit Table with Complimentary Power
- Access for Two (2) Conference General Sessions, Including All Meals and Events
- Quarter-Page Ad in Symposium Resource Booklet Distributed to All Attendees
- Participation in Passport Event to drive attendees to the in-person booth
- Participation in Gamification Driving Attendees to Sponsor Website
- Electronic Registered Attendee List with Permission For one Pre and one Post Event Email to Attendees
- Specially Designed Digital Exhibitor Page to be Visited by Attendees (Virtual Attendees)

Bronze Sponsor

\$6,500 | Six Available

- Designation as Bronze Sponsor on Conference Materials
- Designation as a Bronze Sponsor on the Symposium Website with Link
- Designation as a Bronze Sponsor on Marketing Emails for the Program
- One Exhibit Table with Complimentary Power
- Access to Two (2) Conference General Sessions, Including All Meals and Events
- Quarter-Page Ad in Symposium Resource Booklet Distributed to Attendees
- Participation in Passport Event to drive attendees to the in-person booth
- Participation in Virtual Scavenger Hunt so Attendees Must Visit Website
- Participation in Gamification Driving Attendees to Sponsor Website
- Electronic Registered Attendee List with Permission for One Post Event Email To Attendees
- Specially Designed Digital Exhibitor Page to be Visited by Attendees (Virtual Attendees)

Welcome & Registration Sponsor

SOLD OUT

\$6,000 I One Available

- Welcome Sponsor signage at the Registration Table
- Designation as Welcome Sponsor on Conference Materials
- Designation as Welcome Sponsor on the Symposium Website with Link
- Designation as Welcome Sponsor on Marketing Emails for the Program
- One Exhibit Table with Complimentary Power
- Access for One (2) Conference General Sessions, Including All Meals and Events
- Quarter-Page Ad in Print and Symposium Resource Booklet Distributed to All Attendees
- Marketing Materials Distributed in Welcome Packet
- Electronic Registered Attendee List with Permission for One Post Event Email To Attendees
- Participation in Passport Event to drive attendees to the in-person booth
- Participation In Gamification Driving Attendees to Sponsor Website
- Specially Designed Digital Exhibitor Page to be Visited by Attendees (Virtual Attendees)

Exhibit Booth

\$4,000 I Limited Availability

- One Exhibit Table Placement Determined by Registration and Payment Date
- Designation as Exhibitor on the Symposium Website
- Designation as Exhibitor on Conference Materials
- Quarter-Page Ad in Print and Symposium Resource Booklet Distributed to all Attendees



- Participation in Passport Event to drive attendees to in-person booth
- Participation in Gamification Driving Attendees to Sponsor Website
- Access for Two (2) Conference General Sessions, Including all Meals and Events
- Electronic Registered Attendee List with Permission for One Post Event Email to Attendees
- Specially Designed Digital Exhibitor Page to be Visited by Attendees (Virtual Attendees)

Pre-Session Sponsor - Attorney Track

SOLD OUT

SOLD OUT

Pre-Session Sponsor - Fiduciary Track

\$5,500 I One Per Track

- Designation as Pre-Session Sponsor either for Attorney or Fiduciary on the Symposium Website
- Designation as Pre-Session Sponsor on Conference Materials
- Designation as Pre-Session Sponsor on the Symposium Website with Link
- Designation as Pre-Session Sponsor on Marketing Emails for the Program
- One Exhibit Table with Complimentary Power
- Access for Two (2) to Pre-Session Events and General Sessions
- Quarter-Page Ad in Print and Symposium Resource Booklet Distributed to Attendees
- Participation in Gamification Driving Attendees to Sponsor Website
- Participation in Passport Event to drive attendees to in-person booth
- Specially Designed Digital Exhibitor Page to be Visited by Attendees (Virtual Attendees)

Conference Swag Sponsor

\$4,000 I One Available

- Exclusive Logo Placement on swag handed out to all attendees
- Designation Conference Swag Sponsor on Conference Materials
- Designation as Conference Swag Sponsor on the Symposium Website with Link
- Designation as Conference Swag Sponsor on Marketing Emails for the Program
- Access for Two (2) Conference General Sessions Including All Meals and Events
- Quarter-Page Ad in Print and Symposium Resource Booklet Distributed to All Attendees
- Exhibitor Table NOT included

Flash Drive Sponsor

\$4,000 I One Available

- Exclusive Logo Placement on Flash Drive Containing Full Symposium Materials
- Sponsor PDF Marketing Materials Included on Flash Drive
- Designation Flash Drive Sponsor on Conference Materials
- Designation as Flash Drive Sponsor on the Symposium Website with Link
- Designation as Flash Drive Sponsor on Marketing Emails for the Program
- Access for Two (2) Conference General Sessions Including All Meals and Events
- Quarter-Page Ad in Print and Symposium Resource Booklet Distributed to All Attendees
- Exhibitor Table NOT included

Espresso Bar Sponsor

\$3,000 - Thursday \$4.000 - Friday

One Available Per Day

- Exclusive Logo for the Friday espresso bar for 6-hours in exhibit hall, including on cups and napkins
- Exclusive Logo for the Thursday espresso bar for 6-hours in exhibit hall, including on cups and napkins
- Designation as Espresso Bar Sponsor on Conference Materials
- Designation as Espresso Bar Sponsor on the Symposium Website with Link
- Designation as Espresso Bar Sponsor on Marketing Emails for the Program
- Access for Two (2) Conference General Sessions, Including All Meals and Events
- Quarter-Page Ad in Print and Symposium Resource Booklet Distributed to All Attendees
- Exhibitor Table NOT included



Audio Visual Sponsor

\$3,250 I Two Available

- Designation as AV Sponsor on the Symposium Website
- Designation as AV Sponsor on Conference Materials
- Designation as AV Sponsor on the Symposium Website with Link
- Logo on Large Screens Between Sessions and During Breaks for Two and a Half Days
- Quarter-Page Ad in Symposium Resource Booklet Distributed in Welcome Packet
- Access to One (1) Conference General Session and all Meals and Events
- Exhibitor Table NOT included

CE & CLE Sponsor

\$3,000 I Two Available - One Left

- Designation as CLE & CE Sponsor on the Symposium Website
- Designation as CLE & CE Sponsor on Conference Materials
- Designation as CLE & CE Sponsor on the Symposium Website with Link
- Quarter-Page Ad in the Symposium Resource Booklet Distributed in Welcome Packet
- Access to One (1) Conference General Sessions and all Meals and Events
- Exhibit Table NOT included

Meal Sponsor

\$2,500 - Each for Thursday \$3,000 - Each for Friday/Saturday

Five Available

- Sponsorship Signage at Designated Meal
- Opportunity for Marketing Materials to be Set at Place Settings at Designated Meal
- Designation as Meal Sponsor on the Symposium Website
- Designation as Meal Sponsor on Conference Materials
- Quarter-Page Ad in the Symposium Resource Booklet Distributed in Welcome Packet
- Access to One (1) Conference General Sessions and all Meals and Events
- Exhibit Table NOT included

Pocket Agenda Sponsor

SOLD OUT

\$2,500 I One Available

- Logo on Pocket Agenda Distributed in Welcome Packet to Every Attendee
- Designation as Pocket Agenda Sponsor on the Symposium Website
- Designation as Pocket Agenda Sponsor on Conference Materials
- Quarter-Page Ad in Symposium Resource Booklet Distributed in Welcome Packet
- Access to One (1) Conference General Sessions and all Meals and Events
- Exhibit Table NOT included

WiFi Sponsor

SOLD OUT

\$2,000 I One Available

- Handout of Wi-Fi login to all attendees, sponsors, and exhibitors with logo
- Designation as Wi-Fi Sponsor on Conference Materials
- Designation as Wi Fi Sponsor on the Symposium Website with Link
- Quarter-Page Ad in Symposium Resource Booklet Distributed in Welcome Packet
- Access to One (1) Conference General Sessions and all Meals and Events
- Exhibit Table NOT included

Break Sponsor

\$2,000 | Seven Available

- Sponsorship Signage at Designated Break
- Designation as Break Sponsor on the Symposium Website with Link
- Designation as Break Sponsor on the Symposium Agenda
- Quarter-Page Ad in Symposium Resource Booklet Distributed in Welcome Packet
- Access to One (1) Conference General Sessions and all Meals and Events
- Exhibit Table NOT included

Virtual Exhibitor

\$2,500 I One Available

- Specially Designed Digital Exhibitor Page to be Visited by Attendees (Virtual Attendees)
- Designation as Virtual Exhibitor on the Symposium Website
- Designation as Virtual Exhibitor on Conference Materials
- Designation as Virtual Exhibitor on the Symposium Website with Link
- Quarter-Page Ad in Print and Symposium Resource Booklet Distributed to all Attendees
- Participation in Gamification Driving Attendees to Sponsor Website
- Access for One (1) Conference General Sessions Including all Meals and Events
- Electronic Registered Attendee List with Permission For One Post Event Email To Attendees
- In-Person Exhibit Table NOT included

Virtual Conference Attendee Kit

\$1,000 | Three Available

- Designation as Virtual Conference Attendee Kit Sponsor on the Symposium Website
- Designation as Virtual Conference Attendee Kit Sponsor on Conference Materials
- Virtual Conference Attendee Kit may Include Snack Kit and More
- Add Sponsor's appropriately sized Marketing Material in Kit
- Quarter-Page Ad in Symposium Resource Booklet Distributed to Attendees
- Registration to the Event is NOT included
- Exhibitor Page NOT included

Virtual Break Sponsor

\$750 | Five Available

- Logo online for virtual attendees during designated break
- Designation as Virtual Break Sponsor on the Symposium Website
- Designation as Virtual Break Sponsor on Conference Materials
- Quarter-Page Ad in Symposium Resource Booklet Distributed in Welcome Packet
- Registration to the Event is NOT included
- Exhibit Table NOT included

NEW

Conference Flowers Sponsor

\$750 | One Available

- Designation as Flower Sponsor on the Symposium Website
- Designation as Flower Sponsor on Conference Materials
- Designation as Flower Sponsor on the Symposium Website with Link
- Quarter-Page Ad in the Symposium Resource Booklet Distributed in Welcome Packet
- Registration to the Event is NOT included
- Exhibit Table NOT included

Coffee Service & Beverage Sponsor

SOLD OUT

\$500 I Thursday, Friday, and Half Saturday Available

- Designation as Coffee Service/Beverage Sponsor on the Symposium Website with Link
- Sponsorship Signage on Designated Day, Selling Thursday, Friday, and ½ price Saturday.
- Quarter-Page Ad in Print and Symposium Resource Booklet Distributed to All Attendees.
- Registration to the Event is NOT included
- Exhibit Table NOT included

Sponsor	Email to Attendees	Sponsor Marketing Materials Distributed	Ad in Resource Guide	Marketing Event Recogition	Number of Full Registration	Exhibit Booth
Diamond \$15,000	Email Before & After Event	Yes	Full Page	Designated Diamond on Event Marketing	5	Free First Choice
Platinum \$13,000	Email Before & After Event	Yes	Full Page	Designated Platinum on Event Marketing	4	Free Second Choice
Lanyard \$10,000	Email Before & After Event	Yes	Full Page	Designated Lanyard on Event Marketing	3	Free Third Choice
PowerPoint \$10,000	Email Before & After Event	Yes	Full Page	Designated PowerPoint on Event Marketing	3	Free Fourth Choice
Online Streaming \$10,000	Email Before & After Event	Yes	Full Page	Designated Online Steaming on Event Marketing	3	Free Fifth Choice
Key Card \$10,000	Email Before & After Event	Yes	Full Page	Designated Key Card on Event Marketing	3	Free Sixth Choice
Gold \$8,500	Email Before & After Event	Yes	Half Page	Designated Gold on Event Marketing	3	Free Next Choice
Silver \$7,500	Email Before & After Event		Quarter Page	Designated Silver on Event Marketing	2	Free Next Choice
Bronze \$6,500	Email Before & After Event		Quarter Page	Designated Bronze on Event Marketing	2	Free Next Choice
Welcome/ Registration \$6,000	Email Before & After Event	Yes	Quarter Page	Designated Registration on Event Marketing	2	Free Next Choice

Sponsor	Email to Attendees	Sponsor Marketing Materials Distributed	Ad in Resource Guide	Marketing Event Recogition	Number of Full Registration	Exhibit Booth
Pre-Session Tracks \$5,500	Email Before & After Event		Quarter Page	Designated Pre- Session on Event Marketing	2	Free Next Choice
Exhibit Booth \$4,000	One Email After Event		Quarter Page	Designated Exhibitor on Event Marketing	2	\$4,000
Conference Swag \$4,000	One Email After Event		Quarter Page	Designated Conference Swag on Event Marketing	2	\$4,000
Flash Drive \$4,000	One Email After Event		Quarter Page	Designated Flash Drive on Event Marketing	2	\$4,000
Espresso Bar \$3,000- 4,000	One Email After Event		Quarter Page	Designated Espresso Bar on Event Marketing	2	\$4,000
Audio Visual \$3,250	One Email After Event		Quarter Page	Designated Audio Visual on Event Marketing	1	\$4,000
CE & CLE \$3,000	One Email After Event		Quarter Page	Designated CE/CLE on Event Marketing	1	\$4,000
Meal \$2,500 - 3,000	One Email After Event		Quarter Page	Designated Meal on Event Marketing	1	\$4,000
Pocket Agenda \$2,500	One Email After Event		Quarter Page	Designated Pocket Agenda on Event Marketing	1	\$4,000
WiFi \$2,000			Quarter Page	Designated WiFi on Event Marketing	1	\$4,000

Sponsor	Email to Attendees	Sponsor Marketing Materials Distributed	Ad in Resource Guide	Marketing Event Recogition	Number of Full Registration	Exhibit Booth
Break \$2,000			Quarter Page	Designated Break on Event Marketing	1	\$4,000
Virtual Exhibitor \$2,000	Email Before & After Event		Quarter Page	Designated V. Exhibitor on Event Marketing	1	\$4,000
Virtual Attendee Kit \$1,000			Quarter Page	Designated V. Attendee Kit on Event Marketing		\$4,000
Virtual Break \$750			Quarter Page	Designated V. Break on Event Marketing		\$4,000
Flowers \$750			Quarter Page	Designated Flower Sponsor on Event Marketing		\$4,000
Coffee & Beverage \$500			Quarter Page	Designated Coffee & Beverage on Event Marketing		\$4,000