

Reach Hundreds of Investors at the  
Equity University Wealth Building Summit



Equity University Wealth Building Summit  
September 19-21, 2014

# Don't Miss Out on the Industry-Leading Education and Networking Event of the Year

**This is your opportunity to get your products and services in front of hundreds of motivated investors at the largest seminar for Self-Directed IRA account holders in the country.**

A limited number of sponsorship opportunities are available for the 6th Annual Summit, which consists of three full days of valuable connection-making potential:

- Exposure to a targeted audience of hundreds of investors
- Numerous opportunities for exhibitor/investor interaction
- Successful clients revealing their wealth building strategies and inspiring investors to act now
- Video ads or recognition from main stage
- Afternoon refreshment breaks
- Post-session happy hour events
- Exhibitor passport raffle encouraging investors to visit each exhibitor booth
- Educational webinars to Equity Trust's audience
- A limited number of main stage and breakout speaking opportunities

## **Reach a large, captive audience**

- More than 500 investors expected
- Attendees are Equity Trust clients or investors interested in taking action with self-directed IRAs



## What Some of Last Year's Sponsors Said

"If you're a vendor looking to seek good connections, this is definitely the forum for that. I've done a lot of different shows and I've never experienced what I've had here."

*-Tom Tamrack, InVision Housing Solutions*

"It's about the qualified attendees. People are here ready to make an investment."

*-Charles Sells, PIP Group*

"It wouldn't be right if we didn't come back next year."

*-Julian Shaw, USAROI*

Questions/Additional Information:

**Call Kent Kinzer at  
888-382-4727 x330**





# Wealth Building Summit Agenda: A Sneak Peek



## September 18

Setup: Noon to 5 p.m. ONLY

Exhibitors must be completely set up prior to 5 p.m.  
on September 18



## September 19-21

Wealth Building Summit  
8:30 a.m. to 5 p.m.\*

The three full days of education will include sessions led by  
successful investors, active clients, and industry experts.

Topics include  
(agenda subject to change):

- Tips for investing in tax liens
- Making a profit on distressed property
- How to build wealth without the burden of taxes
- Self-directed investing by the book
- Leaving a legacy of wealth for your family



## Speed Networking

Several opportunities for investors to meet and interact with  
like-minded individuals sharing strategies and interests.



## Teardown: September 21

3-5 p.m. ONLY

\*Agenda and times are subject to change.

# 2014 Sponsorship Opportunities

Description	Diamond	Platinum	Gold	Bronze
Available exhibitor sponsorships	1	5	3	38
Rate	\$25,000	\$15,000	\$10,000	\$4,500
Exhibit space	8' x 5½' (main foyer)	8' x 5½' (main foyer)	8' x 5½' (main foyer)	10' x 10' (Exhibitor Marketplace)
Full summit registrations if staying at Omni host hotel	6	4	3	2
Recognition as sponsor on summit registration website	Included	Included	Included	Included
Company logo displayed at summit	Included	Included	Included	Included
Listing in summit binder including logo, 50-word description and website URL	Included	Included	Included	Included
Acknowledgement from main stage	Included	Included	Included	Included
Color ad space in summit program	Full page	Full page	Half page	-
Company information included in tote bag for all attendees	Included	Included	Included	-
Opportunity to present a two-minute commercial at the start of general sessions/ during breaks	Included	Included	Included	-
2 Invitations to VIP reception with ETC executives and keynote speaker	Included	Included	Included	-
Suite Accommodations - one suite at the Omni for Thursday, Friday & Saturday.	Included	Included	-	-
60-minute educational speaking spot	Main Stage	Breakout*	-	-
One Pre-recorded educational webinar marketed/played to Equity Trust clients and prospects in June, July, and/or August (Webinar must be pre-approved by ETC Compliance)	Included	Included	-	-

\* Only one platinum sponsor will be accepted for each asset class. For example – only one turnkey platinum sponsor, only one tax-lien platinum sponsor, only one property management platinum sponsor, etc.





A La Carte Sponsorships	Cost
Company information included in tote bag for all attendees <ul style="list-style-type: none"> <li>• Brochure/item must be provided to Equity Trust by August 1st – must be pre-approved</li> <li>• Brochure limited to 4 pages (front/back)</li> <li>• No promo items accepted</li> </ul>	\$1,500
Color ad in summit binder	\$500 half-page \$1,000 full-page

Contracts for additional support items must be ordered by August 1. This includes internet, monitors and electricity. The contract will be between the support item provider and the exhibitor. The exhibitor is responsible for all fees.

*Disclaimer: Hotel rooms and expenses are not included in all sponsorship levels and are the responsibility of the attendee.*

# Sponsorship Rules & Regulations

## 2014 Equity University Wealth Building Summit

### PURPOSE OF THE EXHIBIT

The exhibition is for the purpose of education and to provide a service to Equity Trust customers and prospects. NO SOLICITING OF INVESTMENTS DURING THE SUMMIT IS ALLOWED. No UNAPPROVED information may be distributed to any attendee at any time. Employees or representatives of the Retirement Education Group, Inc. (DBA "Equity University") may prohibit distribution of any materials they deem to violate this provision.

### STANDARD EXHIBIT SPACE

Each exhibitor will be provided with:

- Designated exhibition space (See sponsorship levels for exhibit space size)
- One draped table
- Two chairs
- One wastebasket

Upon acceptance of applications for exhibit space, exhibitors will be sent an exhibitor package outlining:

- Shipping procedures
- Setup and dismantle instructions
- Information on securing electricity, audio/visual equipment and other supplies



### ASSIGNMENT OF EXHIBIT SPACE

Exhibitors may choose their exhibit space once payment in full is received. Specific space is reserved for Gold, Platinum and Diamond sponsors.

In assigning exhibit space, full consideration will be given to competing products and general grouping of exhibits for proper display and comparison. Every effort will be made for the equitable assignment of space. Equity University reserves the right to relocate any exhibit for the benefit of the exhibitor or for the betterment of the exhibition. No firm, organization, individual or company without assigned exhibit space will be permitted to display or distribute products/literature, or solicit business within the exhibit hall. Exhibitors will not be permitted to assign, sublet or share with others any part of the space allocated to them without written approval from Equity University.

### EXHIBIT HOURS

Exhibit hours are established by Equity University. Generally, exhibits will be open during breakfasts, breaks and networking receptions, as well as any other hours specifically designated for exhibit viewing. Unless otherwise noted, exhibits may not be open while the summit sessions are in progress. Exhibit hours are scheduled; however, these times are approximate and subject to change pending the final summit agenda. To maintain the educational integrity of the program, exhibitors must adhere to the exhibit hours indicated. Once summit sessions begin, employees or representatives of each exhibitor must end discussions with the participants and participants will be encouraged to return to the sessions. This will enable summit participants to receive the maximum benefit from the summit program and the exhibits. Any exhibitor with employees or representatives that fail to comply



with the Rules and Regulations may be removed from the summit by Equity University at no liability to Equity University.

## **EXHIBIT SETUP AND DISMANTLE**

Exhibitors are responsible for setting up and dismantling their exhibits during established time periods. Setup is the afternoon before the first full summit day. Dismantling occurs after the final break of the last summit day. NOTE: Early dismantling is not permitted (unless at the request of Equity University). Firms that dismantle prior to the end of the exhibit time will not be given priority when choosing booth space at next year's summit or may be denied exhibit privileges at future Equity University programs and Equity University will be entitled to \$3,000 in liquidated damages from each exhibitor that dismantles its exhibit, in whole or in part, prior to the end of the exhibit time on the last day of the summit and such fee will be charged to the exhibitor's credit card on file with Equity University.

## **PRICES**

The booth price includes all items described below (under "Exhibit fee includes"). All payments must be received by Equity University sixty (60) days prior to the start of the summit. Exhibitors will not be allowed access to the exhibition hall unless all fees have been paid in full.

Exhibit fee includes:

- Rental of the standard exhibit space (as described previously)
- Admission to the main summit sessions (in addition to those included as part of exhibitor fees) is \$399 per person.
- Listing in the summit program, including your company contact information and a 50-word description
- Inclusion in the online exhibitor directory. Equity University does not endorse products offered by any sponsor.
- Exhibit fees do not include hotel accommodations.



## **ELIGIBLE EXHIBITS**

Equity University reserves the right to determine the eligibility of any company or product for inclusion in the exhibition and to reject, eject or prohibit any exhibit, in whole or in part, or exhibitor with or without giving cause. If cause is not given, exhibitor's refund shall not exceed the return to the exhibitor of the amount of the exhibit fee unearned at the time of the ejection. If an exhibit or exhibitor is ejected for violation of these Rules and Regulations or any other stated reason, no return of fee shall be made and the exhibitor will be required to vacate the exhibit area.

## **USE OF SPACE**

Exhibitors may use exhibit booths or backdrops, provided they can be accommodated within their individual exhibit space and do not violate fire safety laws. Exhibits must be constructed so as not to obstruct the general view or the view of neighboring exhibits. Interference with the lighting and space of other exhibitors is prohibited. Equity University reserves the right to restrict exhibits that, because of method of operation, materials, or for any reason, become objectionable. All sound equipment must be regulated so that it does not disturb neighboring exhibits or the summit sessions.

Equity University reserves the right to determine at what point sound constitutes interference with others and must be discontinued.

### **CHARACTER OF DISPLAY**

Equity University must approve all materials prior to the summit that an exhibitor desires to display at the summit. Any materials not in keeping with the character and standards of Equity University may not be distributed or utilized by any exhibitor.

### **CLEAN UP FEE**

Equity University has the right to remove any materials displayed or distributed which have not been pre-approved and will charge a Clean Up fee of \$1,000 per violation which will be charged to your credit card on file.

Equity University reserves the right to prohibit or evict any exhibit that, in the opinion of Equity University, detracts from the general character of Equity University. In the event of such restriction or eviction, Equity University and its employees and agents shall not be liable for any refunds of rentals or other exhibit expenses.

### **PROFESSIONAL CONDUCT**

Exhibitors should adhere to professional standards of behavior. All business activities must be confined to the limits of the exhibit space.

### **STAFFING**

Exhibits should be staffed during the specified exhibit hours by knowledgeable representatives. Exhibitors must supply Equity University with the name(s) of all representatives who will attend the exhibition. Equity University will not provide staffing for the exhibits.

### **BADGES**

Exhibitor representatives must wear appropriate Equity University badges at all times in the exhibition hall. The badges will be available at the summit registration desk during the exhibit setup period.



### **SECURITY**

Security is not provided for the exhibit space. Exhibitors are responsible for the safety and security of their exhibits and should consider removing items from the exhibition hall or otherwise securing all equipment, supplies and other materials at the close of each summit day. Neither Equity University nor its employees, representatives, agents, or affiliates are liable for any loss, damage, or stolen goods of any exhibitors.

### **SHIPPING/DRAYAGE/STORAGE**

Exhibitors are responsible for shipping materials to and from the summit. Any and all costs associated with the shipping, drayage and storage of exhibit materials are the responsibility of the exhibitor.



## **FIRE, SAFETY AND HEALTH**

Federal, state and local laws, rules, regulations, codes, and ordinances covering fire, safety and health must be strictly observed. Aisles and fire exits must not be blocked by exhibits, personnel, tables, goods, or by any other object. Storage of boxes and materials beneath exhibit tables may also be restricted. All materials used in decoration must be flame-proof. Electrical wiring must conform to the National Electrical Code Safety Rules. Please follow the instructions of the hotel personnel and/or the contracted exhibition company regarding conformity with fire, safety and health laws, rules, regulations, codes, and ordinances.



## **CARE OF FACILITIES**

Exhibitors or their representatives must not injure or deface the walls or floors of the building. When such damage occurs, the exhibitor is liable to the owner of the property so damaged.

## **HOSPITALITY SUITES**

Hospitality suites must be scheduled so as not to conflict with any scheduled summit activities and be approved by Equity University staff. Publicity for hospitality suites is the responsibility of the suite host and must comply with these Rules and Regulations.

## **CANCELLATION OF EXHIBIT SPACE**

Cancellations received 60 days or more prior to the first day of the summit will entitle the exhibitor to a refund minus 10 percent (10%) of the exhibit fee that has been paid to Equity University. No refunds will be given on cancellations received fewer than 60 days before the first day of the summit. All cancellation requests must be made in writing.



## **TERMINATION OF EXHIBIT**

In the event the premises where the exhibit is to be held, in the sole determination of Equity University, become unfit for occupancy or is substantially interfered with by reason of picketing, strike, embargo, injunction, act of war, act of God, fire, emergency declared by any government agency or any other act beyond the control of Equity University, this agreement may be terminated by Equity University. In the event of such termination, the exhibitor waives any and all damages and agrees that Equity University may, after deducting all costs and expenses including a reserve for claims, refund to the exhibitor as and for complete settlement and discharge of all said exhibitor's claims and demands his pro rata amount of all funds paid by all exhibitors.

## LIABILITY

The exhibitor assumes entire responsibility and hereby agrees to protect, indemnify, defend and save Equity University, the owner of the host facilities, and their respective employees and agents harmless against all claims, losses and damages to persons or property, governmental charges or fines and attorneys' fees arising out of or caused by the exhibitor's installation, removal, maintenance, occupancy, or use of exhibition premises or any part thereof, excluding any such liability caused solely by the gross negligence of the owner of the host facilities, its employees and agents.

In addition, the exhibitor acknowledges that Equity University and the owner of the host facilities do not maintain insurance covering the exhibitor's property and it is the sole responsibility of the exhibitor to obtain business interruption and property damage insurance covering such losses by the exhibitor.

Neither party shall be liable to the other for any special, indirect, incidental, consequential, punitive or exemplary damages or loss, nor any lost profits, savings, or business opportunity. With respect to this agreement in general, the liability of Equity University and its personnel shall not exceed the total amount of fees actually paid to Equity University under this agreement. A claim for the return of fees shall be the exclusive remedy for any damages. The limitation of liability set forth in this paragraph is intended to apply to the full extent allowed by law, regardless of the grounds or nature of any claim asserted and shall survive termination of this agreement.



## INTERPRETATION AND AMENDMENTS

Equity University reserves the right to interpret or amend these Rules and Regulations as it deems proper to ensure the success of the exhibition and further the educational purposes of Equity University.





# Sponsorship Application & Contract

## 2014 Equity University Wealth Building Summit

### Pre-Summit Logistics Information:

The person listed below will receive all exhibit-related correspondence, including the Resource Center Exhibitor Kit/Service Manual.

Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Company: \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Fax: \_\_\_\_\_  
Email: \_\_\_\_\_

### Publicity Information:

The information provided below will be used for exhibitor listings on the summit Web site and program. Please print clearly and list all information exactly the way you would like it to be displayed, including all capitalization and punctuation.

Company: \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Email: \_\_\_\_\_  
URL: \_\_\_\_\_

Have you or any business with which you are affiliated ever been the subject of an investigation or regulatory proceeding initiated by the SEC, FINRA, a State Securities or Insurance Regulator or any Federal Law Enforcement Agency (such as the FBI, IRS, Attorney General, etc.)? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, please explain.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### Booth Selection / Pricing:

Display areas will be assigned based on availability at the time the contract is received.

Standard Display Area

Companies you want to be near (if possible): \_\_\_\_\_

Companies you do NOT want to be near (if possible): \_\_\_\_\_

### Exhibitor Acceptance:

By signing this application, I affirm that I am a duly authorized agent of my organization, that I have the authority to complete and submit this application, and that my organization agrees to all the terms and conditions contained in the exhibitor packet, space application and Sponsorship Rules and Regulations. I further agree that all such items shall be considered a Contract with Retirement Education Group .Inc. DBA Equity University, and binding on my organization, provided that Equity University reserves the right to reject any application and/or terminate this Contract in its sole discretion at any time prior to the date of the Summit, in which event all fees paid by the applicant will be refunded and Equity University will have no further liability to the applicant arising from this application or Contract. By signing this application, I acknowledge that my organization is responsible for full booth payment prior to the ability to set up exhibit space. No exceptions. I also agree to provide updated answers to the Compliance/Regulatory questions above, should my circumstances change after the date of this Contract and before the date of the exhibit. I acknowledge that failure to update my answers to the Compliance/Regulatory questions above may be grounds for immediate termination of my exhibit, with no return of exhibition fees paid.

Print Name: \_\_\_\_\_ Title: \_\_\_\_\_

Print Organization Name: \_\_\_\_\_

Signature (on behalf of Organization): \_\_\_\_\_ Date: \_\_\_\_\_



# Sponsorship Application & Contract

## 2014 Equity University Wealth Building Summit

### Return To:

Kent Kinzer, Equity University, 1 Equity Way, Westlake, OH 44145

My check for \$ \_\_\_\_\_ payable to Retirement Education Group, Inc. is enclosed.

Please bill my credit card:     American Express     Discover     MasterCard     VISA

Card #: \_\_\_\_\_ Exp. Date: \_\_\_\_ / \_\_\_\_ (mm/yy) Amt: \$ \_\_\_\_\_

Name on Card: \_\_\_\_\_ Signature: \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ Country: \_\_\_\_\_ Phone: \_\_\_\_\_

### Payment & Cancellation Policy:

To guarantee space reservation, payment must accompany this signed application in the form of a check (payable to Retirement Education Group, Inc.) or credit card. Credit card payments will be processed and charged upon receipt of this application unless prior arrangements have been made. Full payment must be received 60 days before the summit begins. Cancellations received 60 days or more prior to the summit will entitle the exhibitor to a refund minus 10 percent (10%) of the exhibit fee that has been paid. No refunds will be given on cancellations received fewer than 60 days before the summit's first day. All cancellation requests must be made in writing to Kent Kinzer via email at [events@equity-university.com](mailto:events@equity-university.com).

### For Equity University Internal Use Only:

Date Rcd: \_\_\_\_\_ Amt Rcd: \$ \_\_\_\_\_

Equity University Signature: \_\_\_\_\_ Print Name: \_\_\_\_\_



EQUITY TRUST CONTACT INFORMATION		
Representative: Kent Kinzer	Phone: (888) 382-4727	Date Submitted:
Describe Event (Please attach supporting documentation): Exhibit at the 2014 Wealth Building Summit		
EXHIBITOR/COMPANY OFFICER INFORMATION		
Name - First, Middle & Last Required:	Phone:	
Home Address (No P.O. Box):	Fax:	
	Email:	
AFFILIATED COMPANY INFORMATION		
Company Name:	Phone:	
Address (No P.O. Box):	Fax:	
	Email:	
	Web Address:	
COMPANY/INDIVIDUAL PROFILE		
Describe - What the company does. Does the company manage unsecured money?		
COMPLIANCE USE ONLY		
Reviewed By:	Date:	
Review Results:	Pass	Fail
If Fail, explain (please attach supporting documentation):		
Approved by:	Date:	
GRC Results:	Approved	Denied
		Date:



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