

2015 AAM Summit

in partnership with the Association for Accounting Administration (AAA)
and the American Institute of Certified Public Accountants (AICPA)

June 7–10, 2015 • Walt Disney World Dolphin Resort • Orlando, FL

EXHIBIT AND SPONSOR PROSPECTUS



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ABOUT THE CONFERENCE

In partnership with the Association for Accounting Administration (AAA) and the American Institute of Certified Public Accountants (AICPA), the conference attracts more than 600 accounting marketing professionals and accounting administration professionals — for a total of 1,500 + attendees!

What drives attendees to the Conference year after year?

- ▶ To learn about fundamental issues for small/medium sized firms including: compensation; human capital concerns; firm efficiencies; client retention; new trends in technology utilization; billing practices; fee pressure and collection; how to professionally manage accounting firms; how can small/mid-size firms grow their business?
- ▶ Identifying firm value; succession, mergers & acquisitions; challenges for future partner/leaders; serving the needs of the high-income client.
- ▶ Stay on top with the latest federal and state income tax rulings; tax standards and regulations; healthcare insurance changes; and the geopolitical landscape.
- ▶ New practice management techniques for staffing; marketing of small/medium sized firms; creating a cohesive culture; improve work processes and increase a firm's profitability and competitiveness.
- ▶ How technology solutions benefit firms; technical content focusing on CPAs serving clients better with technology.

SESSIONS INCLUDE

- Avoid Security Breach in the Cloud
- Big Data
- Cloud Computing/Cloud Solution
- Recruiting Strategies
- Cyber Security
- Financial Accounting
- Data Management/Retention
- Estate & Trust Tax Planning Strategies
- Digital Currency
- Lead Generation using Social Media
- Disaster Recovery/Business Continuity
- Mergers and Acquisitions
- e-Signature
- Telemarketing
- Fraud Detection and Analytics
- IT Governance
- Lease vs. Own (software and hardware)
- Marketing
- IT in a Digital Firm
- Mobile CPA
- Project Governance
- Developing Rising Stars
- Security Risk
- Tech ROI
- Data Analysis
- Planning, Forecasting & Budgeting
- Effective Internal Communication
- Liability and Risk Management
- Building Integration in the Cloud
- Creative Benefit Programs
- Accounting Software
- Affordable Care Act Update
- Benchmarking Your Firm

GROUPS/MAIN TRACKS

TECHNOLOGY FOCUS – Basic, daily technologies; tech savvy; advanced technical.

PRACTITIONER FOCUS – Accounting and Auditing, Tax, Practice Management, and Firm Leadership.

DIGITAL FOCUS – How relevant technology is being used in today's forward thinking firms.

ASSOCIATION FOR ACCOUNTING ADMINISTRATION – People Development and Practice Management.

ASSOCIATION FOR ACCOUNTING MARKETING – Marketing Communications, Digital Media, Business Development, and Practice/Professional Development.

For more details on the conference, log on to pstech.cpa2biz.com

DEMOGRAPHICS

87% of Attendees are CPAs

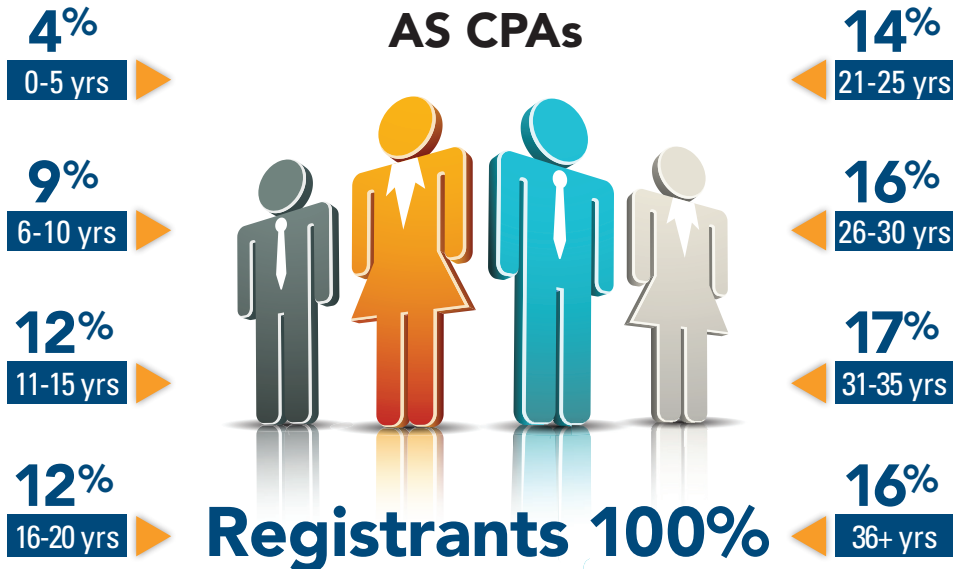
Targeted attendees include senior-level partners, managing partners, managing directors, CFOs, controllers, sole practitioners, shareholders, IT professionals, accounting marketing professionals, accounting administrators, and staff.

1,500 ATTENDEES:	Public Accounting:	70%
	Business & Industry:	15%
	Consulting Firm:	5%
	Education & Government:	3%

A SAMPLING OF LAST YEAR'S ATTENDEES:

- Rogers, Anderson, Malody & Scott, LLP
- Merck & Co Inc.
- CliftonLarsonAllen LLP
- McGladrey LLP
- Boomer Consulting Inc.
- CohnReznick LLP
- IBM
- Moss Adams LLP
- Health Management Systems
- PricewaterhouseCoopers LLP
- Capital One
- Motorola
- Prince & Comin LLP
- Humana
- Kellogg and Kellogg
- Hinton Burdick CPAs
- Bradley & Associates

NUMBER OF YEARS AS CPAs



FIRM SIZE

Sole Practitioner:	4%
2-50 employees:	71%
51-100 employees:	5%
101+ employees:	10%

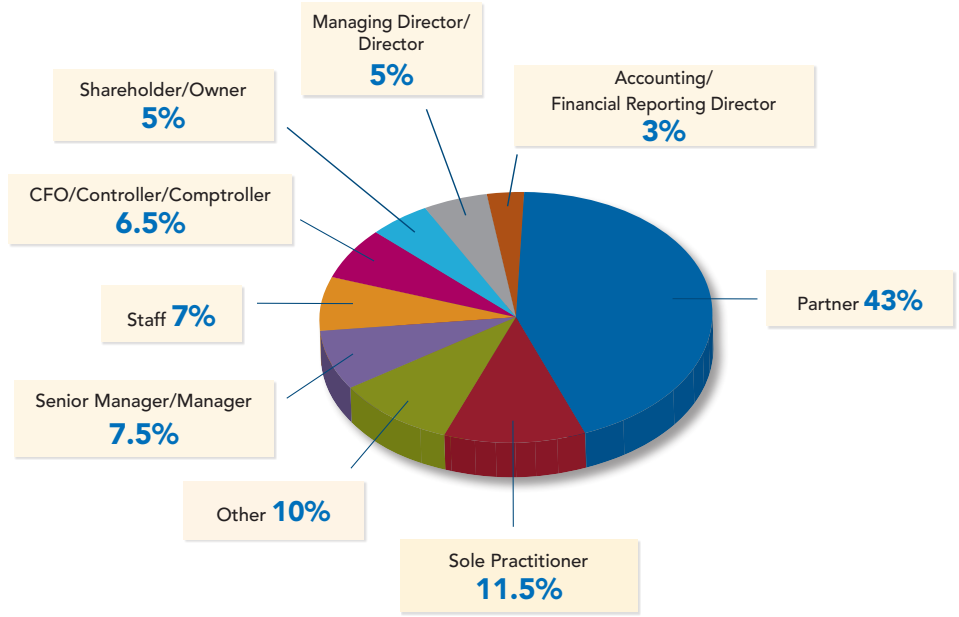


“A big thank you and congratulations from our team for a fantastic conference!”

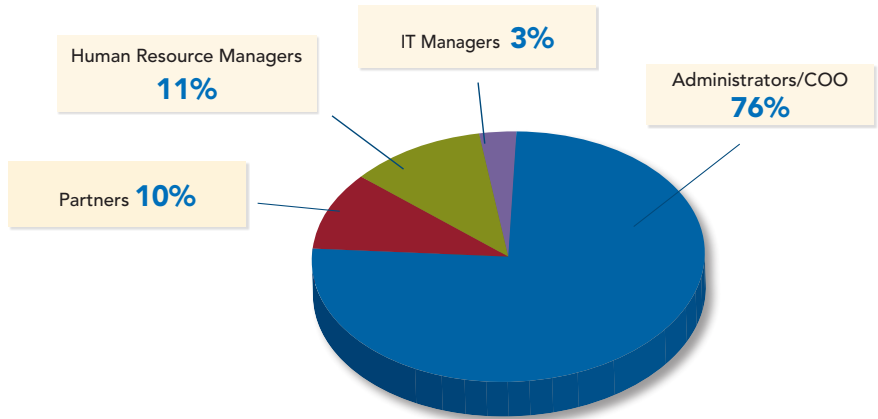
– Deborah Nuccitelli – Xero US Events & Sponsorship Manager

DEMOGRAPHICS

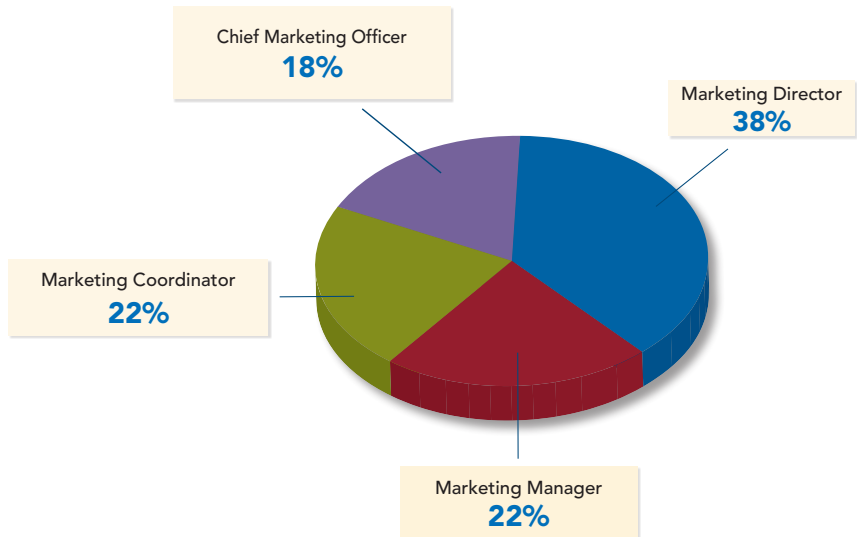
AICPA PS TECH
attendee breakdown:

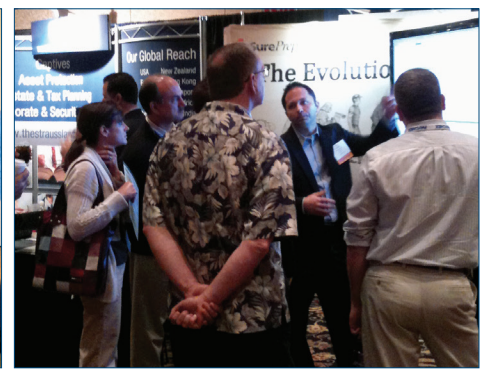


AAA
attendee breakdown:



AAM
attendee breakdown:





WHY EXHIBIT?

Only AICPA delivers a national audience of top-level CPA professionals! You'll benefit from 11+ hours of networking opportunities with the most well-informed, quality audience in the industry. Our attendees are true decision-makers! Participation as a Sponsor or Exhibitor provides exposure to these influential attendees ... and identifies you as a committed partner to the accounting profession.

- ▶ This is Your PRIME Target Market
- ▶ Showcase products & services
- ▶ Introduce new technologies
- ▶ Reach true decision-makers
- ▶ Build brand recognition
- ▶ Network with new clients
- ▶ Strengthen relationships with existing customers
- ▶ Check out your competition
- ▶ Generate qualified leads
- ▶ Stand out as a leader
- ▶ Establish your company as a key player
- ▶ Reach & exceed sales goals
- ▶ Increase market share

EXHIBIT OPPORTUNITIES

Reach and sell 1,500 Accounting and IT Professionals for only ...
\$3800 (standard booth)
\$4300 (premium booth — near entrance, corner booth, near f&b, or near bar)

- 10' x 10' booth in a carpeted ballroom, skirted table, 2 chairs, and a wastebasket.
- 2 main-conference passes with CPE credit if needed.
- Company Listing in the on-site Conference Program.
- 3 Product Listings in the on-site Conference Program.
- Company Listing & Logo in the online exhibitor directory.
- Company Listing on the conference Mobile App.
- Pre- and Post-Attendee List with USPS mailing addresses.
- Invitation to attend all food & beverage functions, including Receptions.
- Discount Code offering a \$100 discount off registration for your clients.

Unlimited expo-only passes are available for \$500 each (no admission to sessions/no CPE credit). Contact Teresa Brueggeman 800.504.4749.

For additional passes with CPE credit, contact Group Sales at 919.402.4823.

RECOMMENDED EXHIBITORS Leaders/Consultants in the areas of:

- Financial Forecasting
- Payroll/Payment Systems
- Financial Data & Analysis
- Profit Improvement
- Business Intelligence
- Capital Budgeting
- Automation/Paperless
- Cloud Computing/Cloud Solutions
- Education
- E-Signatures/Client Portal
- Financial Services/Business Advisory
- Practice Management
- Fraud Prevention
- Recruiting/Networking/Association
- Tax/Automation
- Website Management
- Workflow
- Accounting
- Systems Implementations
- Tax Incentives/Cost Segregation
- Business Performance Management
- Strategic Planning
- Financial Planning & Analysis
- Document Management
- Data Security & Compliance
- CRM/CRM Tools
- Secure File/Content Sharing
- Information Management
- Marketing
- Online Communications
- Research
- Firm Mergers & Acquisitions
- Technology/IT Services
- Software

AAM SPONSORSHIPS

The **AAM Summit** is designed to support marketing professionals in growing the firms they represent. These decision-makers attend the AAM Summit to find latest communications, digital media, and marketing tools, in addition to business development and practice/professional development issues.

Your sponsorship allows us to continue to bring in the nation's top experts as well as provide outstanding networking opportunities and the latest technology to assist in the learning process.

Sponsorship	Cost	Your Staff Introduces Speaker	Logo on Napkins at Event	Tote Bag Insert*	Ad in Conference Program*	Signage On-Site	AV Slides Logo*	Thank You Signage*	Exhibit Booth*	Badges	Conference Program Listing*	Mobile App Listing*	Online Exhibitor Directory*
AAM Silver Sponsor with a Speaking Opportunity	\$20,000			X	Full Page	X	X	X	X	4	X	X	Premium
Annual AAM-MAA Gala on Monday Night	\$10,000		X	X	Full Page	X	X	X	X	2	X	X	Premium
Networking Reception Sponsor on Tuesday	\$8,500		X	X	Full Page	X	X	X	X	2	X	X	Premium
AAM 1st Timer's Reception on Sunday	\$7,000		X		Half Page	X	X	X	X	2	X	X	Standard
Specialty Bar Sponsor at Annual AAM-MAA Gala	\$6,500		at bar only		Half Page	X	X	X	X	2	X	X	Standard
AAM Keynote Speaker Sponsor	\$6,300	X				X	X	X	X	1	X	X	Standard
Morning Refreshment Break Sponsor	\$5,000		X			X	X	X		1	X	X	Standard
Exhibitor – Premium Booth Location	\$4,300								X	2	X	X	Standard
Exhibitor – Standard Booth Location	\$3,800								X	2	X	X	Standard
Drink Ticket Sponsor for AAM 1st Timer's Reception	\$3,500									1	X	X	Standard
AAM Featured Topic Session Sponsor (5 topics, 1 sponsor per topic)	\$3,200/topic	X								1	X	X	Standard
Pen & Paper Sponsor	\$3,000									1	X	X	Standard
AAM Closing Session Wrap-Up Sponsor	\$2,500	X								1	X	X	Standard
AAM Pavilion Sponsor (for 1st time exhibitors only)	\$2,000					shared signage				1	X	X	Standard
Conference Program Guide Sponsor – Logo in Notes Section	\$1,700									1	X	X	Standard
AV Technology Sponsor – Logo in Materials Download Section	\$1,500									1	X	X	Standard

* These features will also be promoted to the AAM and AICPA conference attendees — at no additional cost — for a total audience of 1,500!



2015 EXHIBIT SPACE APPLICATION & CONTRACT

2015 AAM SUMMIT

in partnership with the Association for Accounting Administration (AAA) and the American Institute of Certified Public Accountants (AICPA)
JUNE 7-10, 2015 • WALT DISNEY WORLD DOLPHIN RESORT • ORLANDO, FL

PRE-CONFERENCE LOGISTICS INFORMATION:

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

Name: _____
Title: _____
Company: _____
Address (no P.O. Boxes): _____
City: _____ State: _____ ZIP: _____
Phone: _____ Fax: _____
Email: _____

PUBLICITY INFORMATION:

The following information will be used for exhibitor listings in the conference program. Please **type or print clearly** and list all information exactly as it should appear for publication, including all capitalization and punctuation.

Company: _____
Address: _____
City: _____ State: _____ ZIP: _____
Phone: _____
Email: _____
URL: _____

EXHIBIT SPACE ASSIGNMENT / PRICING: Locations will be assigned based on availability at the time the contract and full payment is received.

Premium Booth Location: \$4,300 per 10' x 10' space _____ # of spaces: _____.

Standard Booth Location: \$3,800 per 10' x 10' space _____ # of spaces: _____.

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

Companies you want to be near (if possible): _____

Top 3 booth choices (if available): 1st _____ 2nd _____ 3rd _____

CONFERENCE SPONSOR: Indicate the type of sponsorship and price below. If you are interested in additional sponsorship opportunities, please contact Morris Marketing at 800.504.4749 x106.

Sponsorship: _____ Price: _____

PAYMENT AND CANCELLATION POLICY: Space locations will be confirmed once application and full payment is received. Full payment must be received 30 days of the invoice date. **Applications received within 60 days of the conference will be invoiced immediately and must be paid immediately.** Cancellations received 60 days or more prior to the conference will entitle the exhibitor to a refund minus 10 percent (10%) of the exhibit fee. No refunds will be given on cancellations received fewer than 60 days before the conference. All cancellation requests must be made in writing to Morris Marketing via fax 888.316.9536 or email amorris@morrismarketinginc.com.

EXHIBITOR ACCEPTANCE: By signing this contract, 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 prospectus, space application and contract. By signing this contract, I acknowledge that I am responsible for full booth payment.

Print Name: _____ Title: _____

Signature: _____ Date: _____

RETURN EXHIBIT APPLICATION TO: tbrueggeman@morrismarketinginc.com or Fax 888.316.9536

IF PAYING BY CHECK, MAKE PAYABLE & SEND TO: AICPA Conferences, PS TECH, PO Box 25824, Lehigh Valley, PA 18002-5824

IF PAYING BY CREDIT CARD, COMPLETE ATTACHED PAYMENT FORM & SEND TO: tbrueggeman@morrismarketinginc.com

FOR AICPA USE ONLY: Date Rcd: _____ Date Entered: _____ Booth # Assigned: _____ Total Price: \$ _____ Amt Rcd: \$ _____ Balance Due: \$ _____ BATES No. _____

PURPOSE OF THE EXHIBIT: The exhibition is for the purpose of education and to provide a service to the AICPA membership.

STANDARD EXHIBIT SPACE: The exhibition space will be provided in the form of a tabletop space. Each exhibitor will be provided with:

- One draped table;
- Two chairs; and
- One wastebasket.

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

- Shipping procedures;
- Set-up and dismantle instructions; and
- Information on securing electricity, audiovisual equipment and other supplies.

PRICES: The exhibit price includes all items described below (under "Exhibit fee includes"). All payments must be received by the AICPA within 30 days of the invoice date. All exhibits and sponsorships must be paid in full prior to the start of the conference. 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 conference sessions for two (2) representatives from the exhibiting company. (For additional conference passes, contact Ashley Butler, AICPA Group Sales, 919.402.4823.) Additional unlimited expo-only passes may be purchased at \$500 each (no admission to sessions).
- Breakfasts, breaks, luncheons and the welcome reception for two (2) representatives from the exhibiting company;
- Registration list, including the names and postal addresses of conference participants (no e-mail addresses), before and after the conference for one-time use;
- Listing in the conference program, including your company contact information and a 50-word description;
- Basic listing in the online exhibitor directory; and
- Special discount for your customers and prospects to attend the conference.

The AICPA does not endorse products offered by any vendor unless otherwise stated.

* Exhibit fees do not include hotel accommodations.

EXHIBIT HOURS: Exhibit hours are established by the AICPA. Unless otherwise noted, exhibits may not be open while the conference sessions are in progress. Exhibit hours are scheduled; however, these times are approximate and subject to change pending the final conference agenda. To maintain the educational integrity of the program, exhibitors are asked to adhere to the exhibit hours indicated. This will enable conference participants to receive the maximum benefit from the conference program and the exhibits.

EXHIBIT SET-UP AND DISMANTLE: Exhibitors are responsible for setting up and dismantling their exhibits during established time periods. NOTE: Early dismantling is not permitted. Firms that dismantle prior to the end of the exhibit time will not be given priority when choosing booth locations at next year's conference or may be denied exhibit privileges at future AICPA programs.

ASSIGNMENT OF EXHIBIT SPACE: 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. The AICPA 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 or 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 the AICPA.

ELIGIBLE EXHIBITS: The AICPA 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, liability 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.

USE OF SPACE: Vendors 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. The AICPA 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 conference sessions. The AICPA reserves the right to determine at what point sound constitutes interference with others and must be discontinued. Due to licensing and copyright regulations by ASCAP/BMI regarding music at public meetings, conventions and shows, exhibitors may not play music during the exhibition, either live or recorded.

CHARACTER OF DISPLAY: Any materials not in keeping with the character and standards of the AICPA may not be distributed or utilized by any exhibitor. The AICPA reserves the right to prohibit or evict any exhibit that, in the opinion of the AICPA, detracts from the general character of the exhibition as a whole. This reservation includes persons, things, conduct, printed matter or anything of a character that the AICPA finds objectionable. In the event of such restriction or eviction, the AICPA 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 solicitation, demonstration and other promotional 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 the AICPA with the name(s) of all representatives who will attend the exhibition. The AICPA will not provide staffing for the exhibits.

BADGES: Exhibitor representatives must wear appropriate AICPA badges at all times in the exhibition hall. The badges will be available at the conference registration desk during the exhibit set-up period.

SECURITY: Although the AICPA and the hotel may maintain a security force, exhibitors are responsible for the safety and security of their exhibits and should consider removing from the exhibition hall or otherwise securing all equipment, supplies and other materials at the close of each conference day.

SHIPPING/DRAYAGE/STORAGE: Exhibitors are responsible for shipping materials to and from the conference. 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 covering fire, safety and health must be strictly observed. Aisles and fire exits must not be blocked by exhibits. 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 codes.

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 conference activities and be approved by AICPA 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 conference will entitle the exhibitor to a refund minus 10 percent (10%) of the exhibit fee. No refunds will be given on cancellations received fewer than 60 days before the conference. All cancellation requests must be made in writing to Direct Sales via fax 888.316.9536 or email amorris@morrismarketinginc.com.

TERMINATION OF EXHIBIT: In the event the premises where the exhibit is to be held, in the sole determination of the AICPA, become unfit for occupancy or are 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 the AICPA, this agreement may be terminated by the AICPA. In the event of such termination, the exhibitor waives any and all damages and agrees that the AICPA 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 the AICPA, 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 the AICPA 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 AICPA and its personnel shall not exceed the total amount of fees actually paid to AICPA 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: AICPA 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 the AICPA.

Initials of exhibiting company representative



c/o Morris Marketing Inc.
800.504.4749

2015 Exhibit/Sponsorship Credit Card Payment Authorization Form

Please sign and complete this form to authorize AICPA to make a one time debit to the credit card listed below.

By signing this form you have provided AICPA with permission to debit your account for the amount indicated on or after the indicated date. This is permission for a single transaction only, and does not provide authorization for any additional unrelated debits or credits to your account.

Please complete the information below:

I _____ authorize AICPA to charge my credit card
(full name)

account indicated below for _____ on or after _____. This payment is for
(amount) (date)

Exhibition/Sponsorship at _____
(Specific name of AICPA Conference & Conference Dates)

Company Name _____

Billing Address _____ Phone# _____

City, State, Zip _____ Email _____

Account Type: <input type="checkbox"/> Visa	<input type="checkbox"/> MasterCard	<input type="checkbox"/> AMEX	<input type="checkbox"/> Discover
Cardholder Name _____			
Account Number _____			
Expiration Date _____			
CVV2 (3 digit number on back of Visa/MC, 4 digits on front of AMEX) _____			

SIGNATURE _____ DATE _____

I authorize the above named business to charge the credit card indicated in this authorization form according to the terms outlined above. This payment authorization is for the goods/services described above, for the amount indicated above only, and is valid for one time use only. I certify that I am an authorized user of this credit card and that I will not dispute the payment with my credit card company; so long as the transaction corresponds to the terms indicated in this form.

Please scan and securely email to: tbrueggeman@morrismarketinginc.com

Thank you!
Teresa Brueggeman, Exhibit & Sponsorship Sales