



CALFEE
TAX INSTITUTE

2027

SPONSORSHIP PROSPECTUS



**MARCH 31 -
APRIL 2, 2027**

The Calfee Tax Institute (formerly the Florida Tax Institute) was created by the Florida Tax Education Foundation, Inc., a Florida not for profit corporation, in support of the education of tax lawyers and professionals.

Developed by practicing tax professionals *for* other tax professionals.

The 3-day Institute features programming delivered by **nationally recognized speakers devoted to individual income tax, business tax, and estate/gift tax.** It is designed to be practical, informative, engaging, and innovative. The Institute draws **attorneys, accountants, trust officers, estate planners, insurance and financial planners, appraisers, and planned giving professionals from across Florida and the United States.** The Institute continues to build on the exceptional success of the previous Institutes.

The Institute will take place at The Ritz-Carlton Orlando, Grande Lakes. Firms will exhibit beginning the morning of Wednesday, March 31, 2027 through the afternoon of Friday, April 2, 2027 and will have nearly nine hours of face-to-face time with attendees during meal, break, and reception periods.

Direct inquiries to info@calfeetaxinstitute.org or 866-225-5040



Sponsorship At-A-Glance

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	DIAMOND \$21,000	PLATINUM \$16,000	GOLD \$8,500	SILVER \$5,500	EXHIBITOR \$2,500
Discipline Exclusivity	✓				
Institute Registrations for Representatives or Guests	12	8	6	3	1
Exhibit Booth	Expanded	Expanded	Standard	Standard	Standard
½ One Institute Registration in place of Exhibit Booth			✓	✓	
Preferred Exhibit Hall Placement	✓	✓			
Invitation to Board, Speaker and Sponsor Mixer	✓	✓	✓		
2-Minute Speaker Introduction	2	1	1		
2-Minute Firm-Provided Video Running During Breaks	✓	✓	✓		
1-Minute Firm-Provided Video Running During Breaks			✓		
Attendee Mailing List with Email	Pre- & Post-Institute	Pre- & Post-Institute	Post-Institute	Post-Institute	
15% Discount on Additional Full Conference Registrations	✓	✓	✓		
Logo on Power Station	Exclusive				
Logo on Program Brochure	✓	✓	✓	Printed Name	Printed Name
Logo on Institute Signage	Top Billing	✓	✓	Printed Name	Printed Name
Verbal Appreciation from Podium	Daily	Daily	Opening Remarks on Wed / Closing Remarks on Fri		
Website Placement	Logo with link to company website	Logo with link to company website	Logo with link to company website	Link to company website	Link to company website
Ad in Online Program Materials	Full page	Full page	Full page	Half page	Quarter page
Power at Exhibit Booth	✓	✓	✓	✓	✓

**SPECIAL SPONSOR OPPORTUNITIES:
PAGES FOUR & FIVE**

**SPONSORSHIP ADD-ONS:
PAGE SIX**

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WEDNESDAY RECEPTION: BENEFITS

ATTENDANCE

- Six Institute registrations for representatives or guests
- Invitation to Board, Speaker and Sponsor Mixer

LOGO PLACEMENT

- Prominent signage at the Wednesday reception
- Logo with link to company website on Institute website
- Logo on program brochure

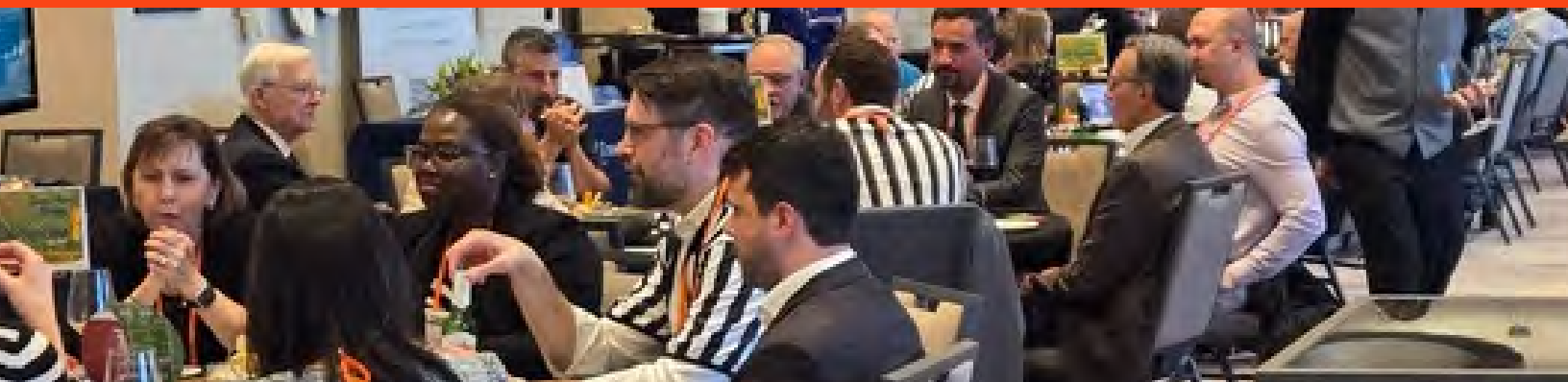
INVESTMENT | \$12,000

GENERAL

- Post-Institute attendee list including email addresses
- Full page, color ad in online materials
- Company representative can make mid-day and closing announcement on Wednesday to promote reception
- 1-minute firm-provided video running during breaks

ADDITIONAL OPPORTUNITIES

- Live musicians during reception (+ \$1,000)
- Open Bar (adds liquor to the standard beer & wine bar, + price TBD)



THURSDAY ATTENDEE MINGLE: BENEFITS

ATTENDANCE

- Eight Institute registrations (six if shared) for representatives or guests
- Invitation to Board, Speaker and Sponsor Mixer

LOGO PLACEMENT

- Prominent signage at the Attendee Mingle
- Logo with link to company website on Institute website
- Logo on program brochure

INVESTMENT | \$16,500 (exclusive) or \$11,000 (shared)

GENERAL

- Five table hosts at Attendee Mingle
- Pre-Institute attendee list including email addresses
- Full page, color ad in online materials
- 2-minute speaker introduction for last speaker and closing remarks on Thursday to promote Mingle event
- 2-minute firm-provided video (1-minute if shared) running during breaks

ADDITIONAL OPPORTUNITIES

- Post-Mingle entertainment/food (+ \$2,500)
- Live musicians during reception (+ \$1,000)
- Open Bar (adds liquor to the standard beer & wine bar, + price TBD)

STUDENT SCHOLARSHIPS: BENEFITS

ATTENDANCE

- Ten current Graduate Tax students from institutions around the country will receive complimentary registration to the Institute

GENERAL

- Verbal appreciation from the podium during Institute opening remarks on Wednesday and closing remarks on Friday

INVESTMENT | \$5,500

LOGO PLACEMENT

- Logo with link to company website on Institute website
- Logo in program brochure

MEAL SPONSOR: BENEFITS

ATTENDANCE

- One Institute registration for representative or guest

GENERAL

- Verbal appreciation from the podium the day of your chosen meal

INVESTMENT | \$3,500

LOGO PLACEMENT

- Prominent Signage at the Meal of Your Choice (two breakfasts and three lunches available - exclusivity at each meal)
- Logo with Link to company website on Institute website
- Logo in program brochure



Want to stand out from the crowd?
Choose one of these sponsorship
add-ons for greater firm visibility.

WiFi

- Logo on WiFi information in the Know Before You Go email to all attendees
- Logo on all WiFi signage at the Institute, including welcome and break slide shows
- Printed name on all Institute signage

INVESTMENT | \$2,500

Artisan Coffee Bar; Frozen Cappuccino, Smoothie or Milkshake Station; or Ice Cream Sundae Bar (during Wednesday night welcome reception)

- Logo placement on prominent signage near bar or station
- Logo on napkins at bar or station
- Printed name on all Institute signage

INVESTMENT | \$2,000

Session Room Power

- Logo on all power signage at the Institute, including welcome and break slide shows
- Printed name on all Institute signage

INVESTMENT | \$1,500

Hydration Station (flavor infused water during all breaks)

- Logo placement on prominent signage near station(s)
- Printed name on all Institute signage

INVESTMENT | \$1,000



Commitment Form

2027 Calfee Tax Institute
March 31 - April 2, 2027

The Ritz-Carlton Orlando, Grande Lakes | Orlando, FL

Step #1, Choose your

Level of Support

	Diamond	Platinum	Wednesday Reception	Gold	Silver	Student Scholarship	Meal (breakfast or lunch)	Exhibitor
Cost of Entry	\$21,000	\$16,000	\$12,000	\$8,500	\$5,500	\$5,500	\$3,500	\$2,500
Select Your Level of Support:							meal choice:	

Step #2, Provide Your Firm's Details

HOW SHOULD YOUR COMPANY NAME APPEAR IN OUR MATERIALS? _____

WEBSITE ADDRESS _____

**Please be exact and make sure text is legible. This information, including the website address, will be used within program materials / as the link (for sponsors that receive website placement).*

What is your firm's primary discipline or specialty? Check all that apply.

☐ Accounting ☐ Banking ☐ Business Valuation ☐ Estate Planning ☐ Financial Planning ☐ Insurance ☐ Law ☐ Tax Planning

☐ Tax Preparation ☐ Trust Services ☐ Wealth Management ☐ Other (please specify): _____

Contacts & Other Important Details

Primary Contact's Name _____

Primary Contact's Telephone _____ Primary Contact's Email _____

Address _____ City, State, Zip Code _____

Primary Contact's Signature _____

**By signing above, I/we agree that we will comply with all rules and regulations contained within the prospectus, including the mail list policy.*

Additional / Marketing Contact (This person will be copied on all pre-Institute details and communication, including the logistics kit that provides information on setup, hall hours, shipping, attendee request, etc. If none, please leave blank.)

Marketing Contact's Name _____

Marketing Contact's Telephone _____ Marketing Contact's Email _____

Address _____ City, State, Zip Code _____

Step #3, Tell us about your participation in the exhibit hall

Will you be utilizing your on-site exhibit booth during the Institute?

Yes ☐ No ☐

Step #4, Sponsorship Add-On: _____

Step #5, Offer Full Payment



✓ FULL PAYMENT REQUIRED WITH COMMITMENT
✓ RETAIN A COPY OF THIS FORM AS YOUR RECEIPT

Enclosed is our \$_____ check payable to "Florida Tax Education Foundation, Inc.", or

_____ I would like ACH payment information, or

Credit Card Number _____ Exp. Date _____

Amount \$_____ Name as it appears on card _____

Zip Code Associated with Credit Card's Billing Address _____ Signature _____

If your firm requires an onboarding process to initiate payment, please email details & instructions to info@calfeetaxinstitute.org.

Direct inquiries to info@calfeetaxinstitute.org

2001 Crocker Rd., Ste. 510 | Westlake, OH 44145 | 866-225-5040



- All booth assignments are handled internally; a floorplan is not released pre-Institute.
- Traditional exhibit displays are limited to table-top size ([example](#)) with the exception of the levels of support that receive expanded space. Retractable signage (floor banners - see [example](#)) is permitted when placed in a location that does not interfere with the flow of traffic and/or sight lines, like behind your booth or on the table.
- The exhibit hall utilizes tabletop exhibits rather than 10 x 10 booths separated by pipe and drape.
- Each exhibitor area will include one six-foot dressed table, two chairs, and a wastebasket. Expanded space provides two six-foot tables.

INBOUND AND OUTBOUND SHIPPING OF BOOTH MATERIALS

Materials will be shipped directly to the hotel using the sponsors preferred carrier; CTI does not utilize an exhibition/drayage company. Instructions will be provided in the final sponsor logistics kit, which is distributed late fall.

SET-UP, TEAR-DOWN, AND EXHIBITION HOURS

The Exhibit Hall will be open during meal, break, and reception periods. The schedule of hall hours and events is shown below (subject to adjustment). *Those who dismantle before the published tear-down time may revoke the right to participate at future CTI programs.*

WEDNESDAY MARCH 31, 2027	THURSDAY APRIL 1, 2027	FRIDAY APRIL 2, 2027
Set-Up 8:30 – 11:00 am	Samuel C. Ullman Memorial Breakfast 8:15 – 9:00 am	Breakfast 8:15 – 9:00 am
Lunch 11:30 am – 1:00 pm	Student Networking Lunch 11:45 am – 1:00 pm	Break 10:55 – 11:15 am
Break 2:50 – 3:30 pm	Break 2:45 – 3:25 pm	Lunch 12:10 – 1:00 pm
All Attendee Welcome Reception 5:00 – 6:00 pm	Attendee Mingle - March Madness Theme 5:00 – 6:30 pm	Tear-Down 1:00 pm

**Take advantage of the open evenings by hosting social events for attendees,
especially on Thursday after the attendee mingle!**

Commitment, Payment & Cancellation • Full payment is required with the commitment form and is non-refundable. The Calfee Tax Institute (CTI) has the right to refuse participation to any person or firm that, in its sole discretion, does not support the mission of the organization or the educational and other purposes of the Calfee Tax Institute.

Act of God • In the case of cancellation of the Institute or unavailability of the exhibit hall due to Acts of God, war, threats or acts of terrorism, governmental authority, fire, strike, labor disputes, frustration of purpose, commercial impracticability, or any other cause beyond the control of the CTI, this agreement shall terminate, and CTI shall not be responsible for any damages or expenses incurred in connection therewith.

Assignment of Exhibit Space • Assignment of space is determined by the CTI in its sole discretion. CTI reserves the right to adjust the floor plan in the event of conflicts, either in advance of the Institute or on-site.

Character of Exhibits • No exhibit shall interfere with another exhibit, impede access to another exhibit, use the space of another exhibit, or interfere with the free use of the aisle in front of any exhibit. All exhibit materials, including decorations, display, and audio-visual equipment must conform to fire regulations and electrical codes of the hotel. Exhibitors with audible electric devices, videos and other exhibits or devices, which might prove objectionable to other exhibitors, may be required to accept booth assignments that diminish reasonable objections.

Dismantling • Any participant that begins dismantling before the published tear-down time may revoke their right to participate in future Institutes.

Distribution of Printed Matter • Except from within rented space or as purchased as a part of this prospectus, sponsors shall not distribute printed matter, samples, souvenirs, and the like. Distribution of materials elsewhere in the exhibit hall, session space, in the hotel, or on hotel property is not permitted.

Insurance & Liability • Sponsor assumes entire responsibility and hereby agrees to protect, indemnify, defend, and save the CTI and its employees, independent contractors, and board of directors harmless against all claims, losses and damages to persons or property, governmental charges or fines and attorney's fees arising out of or caused by sponsor's transportation, installation, removal, maintenance, occupancy, display or use of exhibits, or of the exhibition premises or a part thereof, or for the conduct of or harm caused to attendees at any special supplemental event hosted by the sponsors, excluding any such liability caused by the sole negligence of CTI and its employees, contractors, and board of directors.

Logos and Publicity • CTI will use the logo(s), firm name, design(s), trademarks, etc. provided by Sponsor for the sole purpose of fulfilling benefits associated with the sponsor's chosen level of support and may do so without obtaining prior consent. FTI and Florida Tax Institute names or logos may not be used by Sponsor for any purpose. The sponsoring or exhibiting company may reference their attendance at the "13th Annual Florida Tax Institute".

Mail List Policy and Usage • All Institute sponsors receive one pre-Institute and one post-Institute mailing list of contact details for use in promoting their attendance at the annual Institute. This list will include name, designations/discipline, firm name, and postal mailing address to the extent that they were provided by the attendee, for those who have not opted out of receiving sponsor messages.

Diamond and Gold sponsors will also receive email addresses within the attendee list.

The pre-Institute list will be emailed to the primary and marketing contact four weeks prior to the program and the post-Institute list will be sent two weeks after the conclusion of the program. By completing the commitment form and accepting delivery of these lists, a sponsoring company agrees to the terms outlined within this section.

Mail List Policy and Usage, Continued •

- User may use attendee contact information for an approved use ONCE each time an attendee list is distributed. The pre-Institute list may only be used pre-Institute and the post-Institute list must be used within thirty (30) days of the date on which it was sent to the sponsoring or exhibiting firm by CTI.
- Use of the list to gather phone numbers is prohibited, as is telephoning those who appear within.
- All messages must contain a mechanism by which the recipient can opt-out.
- CTI and Calfee Tax Institute names or logos may not be used on any material mailed by user. The sponsoring or exhibiting company should reference their attendance at the "Calfee Tax Institute".
- An approved use includes a postal mailing. If sponsoring firm is entitled to email addresses, an email message is also an approved use.
- User may not copy, replace, or duplicate the information contained within, any portion thereof, or extract or retain any information there from. User may not at any time permit any attendee names and addresses to pass into the hands of any other person, association, organization, or company.
- User will hold the provider harmless against any damages or claim of damage, costs and reasonable attorney fees, arising out of any actual or alleged impropriety or illegality of mailed matter or infringement of trademark, trade name, or copyright belonging to others.
- User agrees to forward within ten (10) days following receipt, any letters or documents (or copies thereof) of complaints received from attendees or a report of verbal complaints by attendees regarding the user's mailing, the matter transmitted therein, or the offered product or service.
- The user is solely responsible for determining that the information provided is sufficiently accurate for the user's purposes.

Any prohibited or unauthorized use of the mailing list by a sponsoring company or failure to report attendee complaints constitutes a material breach of the sponsorship agreement and may exclude company from participation in future CTI events and/or cancellation of sponsorship / exhibition space without refund. Direct all questions related to this policy to info@calfeetaxinstitute.org or 866-225-5040.

Programming • Sponsors may not conduct promotional or educational programming including lectures, demonstrations or audiovisual presentations during Institute programming hours.

Property Damage • Sponsors are responsible for damage to property. No signs or other articles shall be posted, nailed, or otherwise attached to any of the pillars, walls, doors, floors, etc., in such a manner as to damage, deface, or destroy.

Shipping Instructions, AV, Electricity & Supplemental Services • Information regarding these items will be available prior to the Institute and will be distributed via email (the "Logistics Kit").

Staffing and Behavior of Representatives • All representatives must be registered with CTI. In the event an attendee is not registered and attends any portion of the event, CTI will invoice the firm for the additional exhibitor fee and such invoice must be paid within 14 days of receipt. Unregistered attendees will not be permitted in the exhibition area.

Any representative or firm displaying inappropriate or aggressive behavior and/or sales tactics, including, but not limited to, touching participants and/or their apparatus without their express permission, will be asked to leave immediately and may result in the removal of an exhibit or cancellation of a sponsorship with no refund of fees, including, but not limited to the sponsor fee, attendee fee, transportation and lodging costs, meals, shipping costs, etc.

A company representative must be present in the exhibit booth during the hours the exhibit hall is open.

Subletting Space • Subletting or sharing of space is not permitted.

Enforceability • If any portion(s) of this document is (are) determined to be invalid or unenforceable, the remaining portion(s) shall nevertheless remain valid and enforceable.