



2017

Sponsor & Exhibitor  
Prospectus

**SSA Annual Conference**

**July 18-20, 2017**

**Hyatt Regency Coconut Point  
Resort & Spa  
Bonita Springs, Florida**

**Shareholder Services  
Association**



The SSA invites you to be a sponsor and exhibitor at its Annual Conference. The SSA is the only industry association dedicated to the professional development, advocacy and networking of the Shareholder Services' Professional.

Shareholder Services Association

Annual Conference

July 18-20, 2017

Hyatt Regency Coconut Point Resort & Spa

5001 Coconut Road

Bonita Springs, Florida



Dear SSA Valued Service Provider:

As we gear up for the Shareholder Services Association's (SSA) July 18-20, 2017 Annual Conference in Bonita Springs, Florida, I would like to provide you with the Sponsor and Exhibitor Prospectus. Through the support of our sponsors, we have been able to hold the premier shareholder services conference in the industry.

Our national conference is the largest gathering of shareholder services professionals in one place. Attendees represent decision makers in a variety of industries ranging in size from Fortune 500 companies to smaller entities.

The SSA is known for, and takes great pride in, holding engaging and effective annual conferences. Attendees look forward to coming together in a very inviting and friendly environment to share insights, ideas, and learn together through effective networking with peers and service providers. There is no better way to share your company's brand and the products and services you offer than through being a conference sponsor.

There are several sponsorship levels, with corresponding benefits available to you and your company. Additional information for available sponsorship levels is provided on the following pages.

For information or assistance regarding sponsorships, please contact Chris Dowd at [cdowd@georgeson.com](mailto:cdowd@georgeson.com) (*SSA Service Provider member*), Tony Battista at [Anthony.Battista@pseg.com](mailto:Anthony.Battista@pseg.com) (*Issuer member*), or myself (*SSA Executive Director*) at [acowart@shareholderservices.org](mailto:acowart@shareholderservices.org).

Sincerely,

*Abby Cowart*

SSA Executive Director



# SSA Annual Conference July 18-20, 2017

## Preliminary Conference Agenda

### Monday, July 17, 2017

2:00 - 5:00 pm. Registration & Information Desk

### Tuesday, July 18, 2017

8:00 - 11:00 am Golf Outing

8:00 - 11:00 am Courses—Intro to Shareholder Services,  
Unclaimed Property & Annual Meeting

8:00 - 4:00 pm Registration/Information Desk

8:00 - 1:00 pm Hospitality Suite

1:00 - 4:30 pm Sessions

4:30 - 5:30 pm Free Time

5:30 - 6:00 pm Cocktails with First Time Attendees

6:00 - 6:30 pm Welcome Reception for All Attendees

6:30 - 10:00 pm Jimmy Buffett Theme - Awards Dinner

# SSA Annual Conference July 18-20, 2017

## Preliminary Conference Agenda

### Wednesday, July 19, 2017

7:00 - 2:30 pm	Registration/Information
7:00 - 8:30 am	Breakfast Buffet
8:00 - 10:15 am	Sessions
10:15 - 10:45 am	Networking Break & Sponsor Exhibits
10:45 - 11:30 am	Sessions continue
11:30 - 1:00 pm	Networking Lunch & Vendor Exhibits
1:00 - 2:30 pm	Sessions
2:30 - 2:45 pm	Quick Break!
2:45 - 4:30 pm	Sessions
4:30 - 6:00 pm	Free Time
6:00 pm -	Vendor dinners

### Thursday, July 20, 2017

7:00 - 8:00 am	Breakfast Buffet
8:00 - 9:30 am	Sessions
9:30 - 10:00 am	Networking Break
10:00 - 11:45 am	Sessions
11:45 - 12:00 pm	Conference Wrap-up & Introduction of 2018 Conference Chair

# Sponsorship & Exhibitor Information

## Hotel Information

### **Hyatt Regency Coconut Point Resort & Spa**

5001 Coconut Road

Bonita Springs, Florida

Rates \$179 nightly plus tax. To make reservations please access the SSA conference webpage at

<https://aws.passkey.com/go/SSA17> . You may also call **1-888-421-1442** and reference the

*Shareholder Services Association*.

## Exhibit Space & Specifications

- ⇒ There are limited number of booth spaces and the spaces are assigned on a first come, first serve basis.
- ⇒ Food and beverage will be provided in exhibit areas during each break and most meals.
- ⇒ Exhibitor set-up is Tuesday, July 18, 8:00-12:00.  
Tear-down is Thursday, July 20, 10:00-5:00.
- ⇒ Additional information for shipping and delivery will be provided at a later date.
- ⇒ Exhibitors are encouraged to have a drawing in their booth and have a winner announced by the SSA.
- ⇒ The SSA will provide each conference attendee (issuers only) a card to have with them as they visit each booth. Please have a stamp at your booth and be ready to indicate each attendee's visit to your booth. On the last day of the exhibiting area, the SSA will draw a completed card for a gift.

**\*\*Wednesday, July 19th** has been left open for dinner for sponsors to provide a special dinner outing to their clients. It will be the responsibility of the sponsor to arrange transportation.

# Annual Conference: Sponsorships

*Network + Share Your Brand + Grow Your Business*

## Platinum Sponsorship: \$15,000.00

- ⇒ Booth in the Exhibit Hall
- ⇒ Full Page Ad in Conference Program
- ⇒ Your logo on the SSA Conference Page
- ⇒ Conference Registration for 3 employees
- ⇒ Personal acknowledgement of Company Rep. during conference
- ⇒ Recognition in the Conference Program and materials
- ⇒ Company profile noted in Conference Program and mobile app
- ⇒ Scrolling banner ad within mobile app
- ⇒ Presentation or Commercial (3 minutes) created by your company and shown during the conference
- ⇒ Discounts on additional advertising opportunities

## Benefactor Sponsorship: \$10,000.00

- ⇒ Booth in the Exhibit Hall
- ⇒ Full Page Ad in Conference Program
- ⇒ Your logo on the SSA Conference Page
- ⇒ Conference Registration for 2 employees
- ⇒ Personal acknowledgement of Company Rep. during conference
- ⇒ Recognition in the Conference Program and materials
- ⇒ Company profile noted in Conference Program and mobile app
- ⇒ Scrolling banner ad within mobile app
- ⇒ Presentation or Commercial (3 minutes) created by your company and shown during the conference

# Annual Conference: Sponsorships

*Network + Share Your Brand + Grow Your Business*

## Champion Sponsorship: \$7,000.00

- ⇒ Booth in the Exhibit Hall
- ⇒ Half Page Ad in Conference Program
- ⇒ Your logo on the SSA Conference Page
- ⇒ Conference Registration for 1 employee
- ⇒ Personal acknowledgement of Company Rep. during conference
- ⇒ Recognition in the Conference Program and materials
- ⇒ Company profile noted in Conference Program and mobile app
- ⇒ Scrolling banner ad within mobile app
- ⇒ Presentation or Commercial (2 minutes) created by your company and shown during the conference

## Supporter Sponsorship: \$5,000.00

- ⇒ Booth in the Exhibit Hall
- ⇒ Half Page Ad in Conference Program
- ⇒ Your logo on the SSA Conference Page
- ⇒ Conference Registration for 1 employee
- ⇒ Personal acknowledgement of Company Rep. during conference
- ⇒ Recognition in the Conference Program and materials
- ⇒ Company profile noted in Conference Program and mobile app

## Sponsor Sponsorship: \$3,500.00

- ⇒ Quarter Page Ad in Conference Program
- ⇒ Personal acknowledgement of Company Rep. during conference
- ⇒ Recognition in the Conference Program and materials
- ⇒ Company profile noted in Conference Program and mobile app



# Annual Conference: Sponsorships

## Contributor Sponsorship: \$1,500.00

- ⇒ Personal acknowledgement of Company Rep. during conference
- ⇒ Recognition in the Conference Program and materials
- ⇒ Company profile noted in Conference Program and mobile app

## Additional Opportunities & Add-Ons

**Additional sponsorships are limited, so reserve yours today!**

## Break Sponsor (max of 4): \$1,200.00 each

- ⇒ Choose morning and afternoon break sponsorships available for Tuesday, Wednesday or Thursday.

## Advertisement in Conference Program

- ⇒ Full Page Ad \$1,500.00
- ⇒ Half Page Ad \$800.00
- ⇒ Quarter Page Ad \$400.00

## Exhibitor Booth Pricing : \$2,500.00 each

## Service Demonstration Room: \$5,000.00

## Conference Bag Sponsor: \$2,000.00

## Beach Towel Sponsor: \$2,000.00

# Sponsorship & Exhibitor Agreement

\*A final invoice will be emailed to the main contact.

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Company Name (Sponsor/Exhibitor)

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Main Contact Name

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Address

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Phone

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Main Contact E-Mail Address

## Sponsorship Selected:

Platinum \$15,000.00 \_\_\_\_\_

Benefactor \$10,000.00 \_\_\_\_\_

Champion \$7,000.00 \_\_\_\_\_

Supporter \$5,000.00 \_\_\_\_\_

Sponsor \$3,500.00 \_\_\_\_\_

Contributor \$1,500.00 \_\_\_\_\_

## Additional Opportunities & Add-ons:

Break Sponsor - Tuesday PM \$1,200.00 \_\_\_\_\_

Wednesday AM \$1,200.00 \_\_\_\_\_

Wednesday PM \$1,200.00 \_\_\_\_\_

Thursday AM \$1,200.00 \_\_\_\_\_

## Advertisement in Conference Program:

Full Page Ad \$1,500.00 \_\_\_\_\_

Half Page Ad \$800.00 \_\_\_\_\_

Quarter Page Ad \$400.00 \_\_\_\_\_

## Misc.:

Exhibitor Booth Pricing: \$2,500.00 \_\_\_\_\_

Service Room Demo.: \$5,000.00 \_\_\_\_\_

Conference Bag Sponsor: \$2,000.00 \_\_\_\_\_

Beach Towel Sponsor: \$2,000.00 \_\_\_\_\_