



2019 Prospectus

July 16-18, 2019

**SSA Annual Conference
The Hotel Annapolis (formerly Loews)
Annapolis, Maryland**



2019 Prospectus

Exhibitors and Sponsors

The SSA Annual Conference is the premier event for those in the shareholder services industry, providing both education and networking to help navigate this complicated industry.

Participation in our conference as a sponsor or exhibitor provides high visibility among our attendees as our conference is the largest gathering of shareholder service professionals in one place. Our attendees represent decision makers in a variety of industries and from various size organizations.

Our conferences are known to be engaging and educational in an inviting and friendly environment, providing the perfect setting for service providers to share their brand value.

We realize that you have options on how to allocate your marketing budget, and we appreciate your participation and support as a sponsor and exhibitor.

SSA Annual Conference Committee

EXHIBITORS

Exhibit Space. Exhibitors will be in the Annapolis Atrium. To promote traffic, SSA has arranged for breakfast (60 minutes), lunch (75 minutes) and breaks (30 minutes) to occur in this same area.

Main Sail Card. Exhibitors will be listed on a card that attendees will visit each table with. SSA will draw a winner on Thursday during closing comments.

Exhibitors are also encouraged to hold a drawing. Winners can be announced by your representative on Thursday during closing comments.

Set-up / Tear-down. Exhibitors can set up Tuesday morning, starting at 7:00 am. One person must be at your table during all open exhibit times. Tear-down is not to occur until Thursday at 11:30 am.

Exhibit Space Specifics. All fees must be paid in full to occupy assigned space. Payment can be made by check or credit card.

There are a limited number of spaces available, assigned on first come, first served basis. The area is 8 x 10 and includes a 6-foot skirted table, 2 chairs, wastebasket and a standard booth sign.

SPONSORS

Sponsorship Opportunities. We have multiple ways to participate in our annual conference. We've made a few enhancements to our options and hope that you find an option that is a good fit for your organization.

Recognition. All sponsors will receive:

- Logo on SSA's event webpage
- Branded items or literature in conference bags
- Logo recognition in printed programs
- Company profile in printed program and on conference app

Conference Attendee List. A list of attendees will be made available for a one-time use upon request.

AD & LOGO SPECS

To ensure your logo appears properly online, in print and in the app, deadlines and formats will be shared once commitments are made.

Conference Program Ad Size:

Full: 6x8

Half: 6x3-7/8

CONFERENCE REGISTRATION

Online registration is available from SSA's website. Early bird fees are:

\$1,095 SSA Members

\$1,295 Non-Members

Fees increase by \$100 after early bird deadline, June 7, 2019.

HOTEL ANNAPOLIS

Rates \$189 per night

[2019 Shareholder Services Annual Conference](#)

EXHIBIT AND CONFERENCE BAG MATERIAL

Conference Bag Items: Anything to be included in the conference bag must be shipped for arrival no more than 7 days in advance of the conference.

All materials must be labeled and marked according to the below guidelines.

2019 SSA Annual Conference / Deb Kessler
Hotel Annapolis
Attn: Paula Schulze
126 West Street
Annapolis, MD 21401

Exhibit Table Material: Anything you need at your table can also be shipped to the hotel using the address above but ship to your own name.

2019 SSA Annual Conference / Your Name

WEDNESDAY NIGHT – SPONSOR EVENTS

Sponsors are encouraged to host dinners or outings for their clients and prospects on Wednesday night. All plans, including transportation, are the responsibility of the sponsor but should be communicated with SSA (dkessler@shareholderservices.org).

CANCELLATION POLICY

Notification of cancellation for sponsorships must be made in writing by June 1. Fees will be refunded in full, less \$100 administration fee. No refund will be given for cancellations after June 1.

2020 ANNUAL CONFERENCE

Save the date for our 2020 Annual Conference.

Location to be announced
July 28-30, 2020

EXHIBITOR / SPONSORSHIP APPLICATION

(updated 5/3/19)

	Amount	Exhibit Table	Program Ad	Signs	Reg. Included	** New ** Room Drop	Video commercial / Verbal Recognition
Benefactor	\$10,000	X	Full	2x6	2	X	3 min
Champion	\$7,000	X	Full	2x3	2	X	2 min
Corporate	\$5,000	X	Half	2x3	1		
Conference Exhibitor	\$3,500	X	Quarter		1		
Networking Break (2)	\$1,200			2x3			
Advertise - full page	\$1,500		Full				
Advertise - half page	\$800		Half				
Room Key (1)*	\$4,000+fees		Quarter				
Charging Station (1)*	\$4,000+fees		Quarter				
WIFI (1)*	\$4,000+fees	-	Quarter				
Monday Night Cruise (2)	\$1,250		Quarter	2x3			
Tuesday Night Dinner (1)	\$4,000	-	Quarter	2x3			
Golf Hole Sponsor	\$250						

*Key, charging station and WIFI all have branding options that will be visible to attendees.

Company Name _____

Sponsorship Selected _____

Contact 1 Name _____

Contact 1 Email / Ph _____

Contact 2 Name _____

Contact 2 Email / Ph _____

Address _____

City, ST, Zip _____

Return to tguy@shareholderservices.org or to SSA, 8441 Wayzata Blvd, #270, Golden Valley, MN 55426. An invoice will be emailed upon receipt of this application and approval of the sponsorship.



SHAREHOLDER SERVICES ASSOCIATION
STAY IN TOUCH • STAY INFORMED • STAY CONNECTED

2019 Conference Agenda

Monday, July 15

6:30 pm - 9:30 pm Networking Event (Sunset Cruise)

Tuesday, July 16

7:30 am - 12:00 pm Networking Event (option for golf or historic walking tour)

8:30 am - 12:00 pm SSPC Exam

1:00 pm - 2:00 pm Networking and Exhibits

2:00 pm - 2:45 pm Opening Ceremony with guest, Senator John C. Astle

2:45 pm - 3:45 pm Roles and Responsibilities of Issuer and Agent
An in-depth look at specific responsibilities on topics like GDPR, audits, P&I assessments, data security, record retention and conversions.

3:45 pm - 4:45 pm Latest Technologies
With today's new shareholders doing more entrepreneurial investing, what technologies are available to attract the next generation (mobile apps, virtual meetings, marketing tools, and analytics).

6:15 pm - 6:45 pm First Time Attendees Reception

6:45 pm - 7:30 pm Welcome Reception

7:30 pm - 9:30 pm Networking Dinner (Crab Bake)

Wednesday, July 17

8:00 am - 9:00 am Networking Breakfast

9:00 am - 10:00 am Legal and Regulatory Updates
Updates, changes, impacts and requirements of regulatory bodies that govern the shareholder services industry.

10:00 am - 11:00 am	Unclaimed Property Update on changes and impacts.
11:00 am - 11:30 am	Networking Break and Exhibits
11:30 am - 12:30 pm	Cutting vs. Containing - Best Practices for Cost Savings Suggestions on cost saving ideas without compromising customer service. Best use of internal and external partners to contribute to the bottom line.
12:30 pm - 1:45 pm	Networking Lunch and Exhibits
1:45 pm - 2:45 pm	Better Shareholder Communications Effective and creative ways to communicate with shareholders (technology, websites, incentives, buck slips); what works and what hasn't worked.
2:45 pm - 4:30 pm	Open Forum An opportunity to ask and answer questions, share best practices and creative ideas.
4:30 pm - 6:00 pm	Networking Event (TBD)

Thursday, July 18

8:00 am - 9:00 am	Networking Breakfast and Exhibits
9:00 am - 10:00 am	Unclaimed Property State Panel
10:00 am - 11:00 am	Annual Meeting Best Practices Shareholder registration, virtual meetings, retail vote, engaging retail holders, etc.
11:00 am - 11:30 am	Networking Break and Exhibits
11:30 am - 12:30 pm	Industry Hot Topics Cybersecurity, crowdfunding, RegA + Offerings, crypto currency and block chain processing.
12:30 pm - 12:45 pm	Conference Wrap-up
