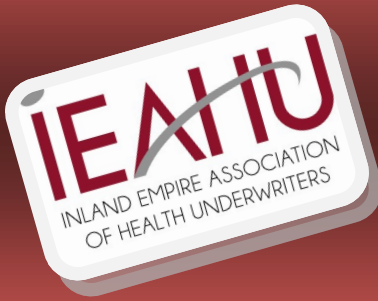


# 2ND ANNUAL SENIOR PRODUCTS & MARKETING SUMMIT

AUGUST 18, 2015



*Welcome all Sponsors and Exhibitors:*

*We are excited to announce the second annual "Senior Products & Marketing Summit". This year's event is hosted by OCAHU, IEAHU & SDAHU chapters of the Health Underwriters.*

*This year will be even more exciting than last year, we are focusing on new products, CMS rulings and how the Medicare agent can educate their clients to new regulations.*

*The event will be held at the Pala Casino Spa Resort planned to make the experience memorable.*

*Because of the huge success of last year's Summit, we anticipate the attendance to be much higher, resulting in more traffic to your booth.*

*By working together with AHU and Medicare agents, we can offer better solutions to the agents that need your products and training.*

*So come and be a part of the fastest growing population in history, "The Golden Years".*

*Sincerely,*

*Maggie Stedt, LPRT & Yolanda Webb, CHRS*

*2015 Event Co-Chairs*



**Orange County Association of Health Underwriters in Collaboration with the  
Inland Empire Association of Health Underwriters and San Diego Health  
Underwriters Presents:**

**Senior Products and Marketing Summit 2015**

*2015 Exhibitor Application*

This application is made on the \_\_\_\_ day of the month of \_\_\_\_, 2015 between:

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(Print the **name** of the proposed **exhibitor** in the space provided above)

The above named company (herein called Exhibitor) and the Orange County Association of Health Underwriters, Inland Empire Association of Health Underwriters and San Diego Association of Health Underwriters (Herein called OCAHU/IEAHU/SDAHU) upon the terms and conditions below.

1) TABLE RENTAL FEES: In consideration of the sum of \$ \_\_\_\_ (see Fee Schedule Page) paid to, and upon acceptance of this application by OCAHU/IEAHU/SDAHU, table rental shall be provided to the above referenced Exhibitor for the Senior Product and Sales Summit 2015, scheduled to be held at the Pala Casino and Spa Resort, 11154 Highway 76, Pala, CA 92059 on August 18, 2015. Direct hotel phone number: (760) 510-2270.

2) TABLE LOCATION: We offer sixty five (65) vendor tables will be available for table top displays. OCAHU, IEAHU and SDAHU reserve the right to automatically assign the table locations upon receipt of completed contract and payment. OCAHU, IEAHU and SDAHU also reserve the right to assign space as deemed appropriate. The rental of two tables side by side is not assured and may be refused by OCAHU, IEAHU and SDAHU. ***\*Please Note: The Annual Palladium, Platinum Corporate Sponsors and Major Show Sponsors will have a table in the Exhibitor Area in high visibility all of the day's activities.\****

OCAHU/IEAHU/SDAHU understands that certain vendors prefer table space near certain vendors, or away from certain vendors. Should this be a consideration for you, please complete the items below:

I prefer to be in close proximity to: \_\_\_\_\_.

I prefer not to be in close proximity to: \_\_\_\_\_.

3) YOUR OFFICIAL IDENTIFICATION: Exhibitor agrees to let the Summit and OCAHU/IEAHU/SDAHU use the name of the Exhibitor in any advertising by OCAHU. Exhibitors with names longer than 30 characters including spaces may be shortened at the discretion of OCAHU tradeshow managers.

(In the space above, print the name of your company, as you would like it to appear in all printed materials related to this tradeshow. Use no more than 30 characters including spaces).

4) TABLE FEATURES: It is understood that the Exhibit Fee for each approximate 8' table space includes:

- Summit registration for two company representatives.
- One six-foot draped table and two chairs
- A table identification sign.

OPTIONAL FEATURE: Electricity is provided for at \$35 per table

\_\_\_\_ Yes \_\_\_\_ No

OPTIONAL FEATURE: Hi-Speed Internet is available at no cost to you. Website or video streaming is at an additional cost of \$50 per day \_\_\_\_ Yes \_\_\_\_ No

5) INSTALLATION/BREAKDOWN: Exhibitor shall be responsible for delivery and removal of equipment and display material to and from the exhibit area. Shipping and storage of exhibit material of any type should be arranged directly with the hotel per the Package Handling Instructions. See attached. Rate and Charges are the responsibility of the exhibitor.

6) ACCEPTANCE OF EXHIBIT: OCAHU/IEAHU/SDAHU reserves the right to reject any application for exhibit space. Exhibitors with display items that in the opinion of OCAHU/IEAHU/SDAHU tradeshow managers interfere with the sight line of nearby exhibitors may be modified by OCAHU/IEAHU/SDAHU.

7) PLACE AND NATURE OF EXHIBIT: Display tables and other exhibits shall not be displayed in a way that interferes with other exhibits. No exhibits that violate any municipal or state laws, rules or regulations, including safety codes, will be allowed. The use of a heater or any heat-producing device as part of the exhibit is forbidden unless a special permit is first obtained from the local fire department and a copy of the permit is placed in the files of OCAHU/IEAHU/SDAHU.

Approval must first be obtained from the local fire department for the use, operations or presence of electrical, mechanical, of chemical device, which in the opinion of the local fire department or the official exhibit contractor might be hazardous in a public place.

8) USE OF EXHIBIT SPACE: All demonstrations, interviews, or other activities must be contained within the limits of your exhibit table. No exhibitor shall sign, sublet, or apportion the whole or any part of the space allotted to him without the knowledge and consent of OCAHU/IEAHU/SDAHU. Aisles must be kept clear.

9) NOISY OR OBNOXIOUS EQUIPMENT: If the operation of any equipment or apparatus produces noise of sufficient volume or odors found to be annoying to neighboring exhibitors or guests, it will be necessary to discontinue such operation.

10) RESTRICTION AND LOCATION OF EXHIBITS: OCAHU/IEAHU/SDAHU reserved the right to require any exhibitor to remove any part thereof, which in the sole judgment of OCAHU/IEAHU/SDAHU is not in keeping with the general character of the exhibition or is not in the best interest of the conference, and to remove or relocate any table as be needed for the good of the conference and it's exhibits. The restriction includes any persons, things, conduct, printed material or anything of character, which may be objectionable to the exhibit as a whole. In the event of such restriction or eviction, OCAHU/IEAHU/SDAHU is not liable for any refunds or rentals or other Exhibition expenses. **Table set up is available from 2 pm to 5pm August 17<sup>th</sup> and on August 18th; set-up begins at 6:00 a.m. and must be completed by 8:00 a.m.**

11) TABLE PAYMENT AND CANCELLATION: It is hereby agreed to that an exhibit space may be reserved by Exhibitor. Payment in full must be submitted in order to reserve exhibit space. It is further agreed that in the event Exhibitor fails to perform in accordance with the terms and conditions set forth in the contract and within the Rules and Regulations of Exhibit, OCAHU, IEAHU and SDAHU, as its election, may cancel the contract and retain the full contract fee.

12) SHOW CANCELLATION: Should any situation beyond the control of OCAHU, IEAHU and SDAHU prevent the opening of the exhibit show, OCAHU, IEAHU and SDAHU shall not be held liable for any expenses incurred by the exhibitor except the rental cost of the table space.

13) EXHIBIT PERSONNEL: Each exhibitor is limited to two (2) persons working at one table. All exhibit personnel must be the employees of the exhibitors.

14) FAILURE TO OCCUPY SPACE: Any space which is not occupied by the exhibiting company August 18, 2015 at 8:00AM will be forfeited by the exhibitor and the space may be resold or used by OCAHU, IEAHU and SDAHU without refund, unless previous arrangements for delayed occupancy have been made in writing by OCAHU, IEAHU and SDAHU and the participating exhibiting company.

15) EXHIBITOR SPONSORED ACTIVITIES: Hospitality Suites and/or entertainment activities are not permitted to operate during the hours of the Exhibit Hall. Arrangements for any exhibitor-sponsored activities and hospitality suites must be made with OCAHU/IEAHU/SDAHU at least 30 days prior to opening exhibit.

16) **LIABILITY AND INSURANCE:** OCAHU, IEAHU and SDAHU, the facility (hotel, conference center, etc.), employees and or representatives thereof, and other organizations and persons connected with this conference shall not be held responsible for the safety of exhibits against fire, theft, or property damage, or for accidents to exhibitors or their employees from any cause whatsoever, prior to, during or subsequent to the period covered by the exhibitor contract. Exhibitors should place their own insurance to cover all contingencies. The exhibitor agrees to indemnify those listed above against any claims for such loses, damage or injury upon signing the contract. The exhibitor expressly releases the foregoing institutions, individuals and committees for any and all claims of loss, damage or injury. This also includes the period of storage prior to and following the Conference. Small or casually portable articles of value should be properly secured or removed for safekeeping during the hours the exhibits are closed. Exhibitor assumes entire responsibility and hereby agrees to protect, indemnify, and defend the losses and damages to persons or property. Governmental charges or fines, and attorney's fees arising out of or caused by exhibitors installation, removal or maintenance occupancy, or use of the exhibition premises or a part thereof. In addition, the exhibitor's property and that it is the sole responsibility of the exhibitor to obtain business interruption and property damage insurance covering such loses by exhibitor.

17) **PROTECTION OF EXHIBIT FACILITY PROPERTY:** Exhibitors will be held responsible for any damage done to the building by them or their employees. No nails, tacks, or screws shall be driven into the woodwork or floor of the building. No gasoline, kerosene, acetylene candles, or other flammable or explosive substance will be permitted in the building.

18) **SALES:** Any exhibitor that wishes to sell or take orders on the premises of the show for exhibited products or services must first notify in writing the conference coordinator of all items, products or services for approval. The exhibitor further agree that OCAHU, IEAHU and SDAHU shall be the sole judge of what constitutes sale order taking activities and may order the exhibitor to cease such activity on the premises of the show on penalty of expulsion from the show.

19) **LITERATURE AND DISTRIBUTION:** Printed information may be distributed by exhibitor representatives from the exhibit space only.

20) **EXHIBITOR REGISTRATION:** All exhibitor representatives must register for the show. Badges may be picked up at the registration desk in event foyer.

21) **BADGES:** Badges for you exhibit personnel will be made from the list you submit to OCAHU, IEAHU and SDAHU. Conference badges identify you and are in evidence at all times during the show. Should the names of the attendee's change, in order to assure a printed badge, the exhibiting company must notify OCAHU and/or IEAHU in writing at least five (5) days prior to the exhibit opening. NOTE: Exhibitors must wear the Senior Summit Badges for continued admittance to the Exhibit Room and Meeting Rooms.

22) **VIOLATIONS:** It is expected that exhibitors who violate these regulations will respond to OCAHU, IEAHU and SDAHU requests for correction. Eviction from the Conference exhibit may result from violations of these rules and regulations as determined solely by OCAHU, IEAHU and SDAHU. In the event of such eviction, OCAHU, IEAHU and SDAHU are not liable for any refunds of rentals or other exhibition expenses.

23) **REGISTRATION & NAME TAGS:** Please list all company representatives who will be attending the Conference and representing your company at your table. Please list any additional representatives or guests as additional attendees below for nametags and conference registration and information. Be sure to include \$30 for each additional guest or attendee if postmarked by July 20, 2015. Event name tags MUST be worn by all company representatives during the event.

**AUTHORIZED SIGNATURE OF EXHIBITOR:** \_\_\_\_\_

(I have read, understand and agree to the rules and regulations regarding the OCAHU, IEAHU and SDAHU exhibit program).

### Questions?

**OCAHU Co-Chairperson: Margaret Stedt | 949-492-8234 | [stedtins@cox.net](mailto:stedtins@cox.net)**

**IEAHU Co-Chairperson: Yolanda Webb | 909-481-4000 ext. 325 | [yolandaw@trinityfp.com](mailto:yolandaw@trinityfp.com)**

## PACKAGE HANDLING INSTRUCTIONS

1. Due to space restrictions at the Hotel, it is not possible to store display materials and/or show materials for more than 1 week.
2. The Pala Casino and Spa Resort will accept your materials no more than 7 Business days prior to the meeting date.
3. Each piece must be individually labeled with information below:

Scott Anton  
Pala Casino and Spa Resort  
PMB 40  
35008 Pala Temecula Road  
Pala, CA 92059

**Please note** that packages delivered to Pala, using a carrier other than USPS take longer to be received and are not delivered on Saturday and Sunday. Delivery by carriers other than USPS is to the PALA warehouse. All deliveries are collected and logged and brought over to the Resort at 3:00 p.m.

Event: Senior Products and Marketing Summit

Date: Tuesday, August 18th

4. Exhibitors must make arrangements to ship their materials out of the hotel. The Patron is responsible for sealing and labeling boxes contacting the Shipping Company to make the shipping and billing arrangements.

# OCAHU, IEAHU and SDAHU 2015 EXHIBTOR FEE SCHEDULE PAGE

Exhibitor Name: \_\_\_\_\_

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

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

Exhibitor's table sign should read: \_\_\_\_\_

(In the space above, print the name of your company as you would like it to appear on the sign on your table. Use no more than 30 characters including spaces.)

**FEE SCHEDULES** (Check Appropriate Line): Place number of Units Ordered in Blank & Multiply for total.

**Exhibit Hall Table**

\_\_\_\_\_ Postmarked by July 20, 2015 \$600 X \_\_\_\_\_ = \_\_\_\_\_.

\_\_\_\_\_ Postmarked after July 20, 2015 \$800 X \_\_\_\_\_ = \_\_\_\_\_.

\_\_\_\_\_ **Electricity** \$35 X \_\_\_\_\_ = \_\_\_\_\_.

\_\_\_\_\_ **Internet Service (If Applicable)** \$0 X \_\_\_\_\_ = \_\_\_\_\_.

**ADDITIONAL ATTENDEES (Two included with the table at no additional charge)**

\_\_\_\_\_ Postmarked by July 20, 2015 \$30 X \_\_\_\_\_ = \_\_\_\_\_.

\_\_\_\_\_ Postmarked after July 20, 2015 \$50 X \_\_\_\_\_ = \_\_\_\_\_.

**ADDED VALUE: Purchase a packet of 10 guest VIP tickets in advance to give to your most valued Broker/agent client!**

\$250 x \_\_\_\_\_ = \_\_\_\_\_.

**Program Advertising (Please see attached separate ad fee schedule page):** = \_\_\_\_\_.

**Total: Write check to OCAHU, 1442 E. Lincoln Ave., PMB 441, Orange CA 92865** = \_\_\_\_\_.

ATTENDEES (Two included in table registration fees): - **Print Names Neatly Please!**

1) \_\_\_\_\_ 2) \_\_\_\_\_

ADDITIONAL ATTENDEES (\$30 each by July 20, 2015 | \$50 each after July 20, 2015):

3) \_\_\_\_\_ 4) \_\_\_\_\_

5) \_\_\_\_\_ 6) \_\_\_\_\_

7) \_\_\_\_\_ 8) \_\_\_\_\_

(For additional attendees, use a separate sheet of paper)

Paying with a Credit Card?  Amex  Discover  MasterCard  Visa

Email payment to [orangecountyahu@yahoo.com](mailto:orangecountyahu@yahoo.com) | Fax payment to (858) 408-2671

Printed Name on Card: \_\_\_\_\_

Credit Card Number: \_\_\_\_\_ Exp: \_\_\_\_\_ Security Code: \_\_\_\_\_

Signature: \_\_\_\_\_

## Senior Products & Marketing Summit: 2015 Program Advertisement Rates and Specs

Ad Size	Fees
Full Page (Color - 8 x 10")	\$500.00
Half Page (Color - 8 x 5" horizontal)	\$350.00
Quarter Page (Color - 4 x 6" vertical)	\$165.00
Business Card	\$100.00

All ads are to be Color, Hi-Quality JPG or Hi-Res PDF file. Please send ads to Maggie Stedt at [stedtins@cox.net](mailto:stedtins@cox.net) no later than July 15<sup>th</sup>.

# SENIOR PRODUCTS & MARKETING SUMMIT: 2015

## Sponsorship Opportunities

### Palladium Show Sponsor (SOLD: North American Medical Management (NAMM))

**\$10,000**

Includes:

Two draped vendor tables in the exhibit hall,  
Six tickets *plus four additional attendee tickets*, business card ad in table centerpieces, inside front cover ad in program, recognition in printed materials, signage, website and from podium.  
Three appearances (2 min) at podium and 1 break out session (subject to approval of OCAHU/IEAHU/SDAHU)

### Platinum Show Sponsor (SOLD: Humana)

**\$7,500**

Includes:

Two draped vendor tables in the exhibit hall,  
Five tickets *plus four additional attendee tickets*, business card ad in table centerpieces, outside back cover ad in program, recognition in printed materials, signage, and website and from podium.  
Two appearances (2 min) at podium

### Gold Show Sponsor

**\$5,000**

Includes:

Two tables, two draped vendor tables in the exhibit hall,  
Four tickets *plus four additional attendee tickets*, business card ad in table centerpieces, inside back cover ad in program, recognition in printed materials, signage, website and from podium.  
Two appearances at podium (2 min)

\_\_\_\_\_ Available

### Cocktail Reception (SOLD: Golden Outlook Insurance Agency)

**\$4,000**

Includes:

Two draped tables at Cocktail Reception on Monday, August 17<sup>th</sup> from 5 to 7 pm.  
One draped vendor table in the exhibit hall,  
Four tickets *plus four additional attendee tickets*, business card ad in table centerpieces with one full page ad in program, recognition in printed materials, signage, website and from podium.

### Lunch Service Sponsor (SOLD: Word & Brown Medicare Brokerage)

**\$3,500**

Includes:

Lunch tables with vendor's tablecloths and one draped vendor table in the exhibit hall, two tickets *plus two additional attendee tickets*, luncheon napkins with your logo printed, full page ad in program ad in program, recognition in printed materials, signage website and from podium.

### Keynote Speaker Sponsor

**\$2,500**

Includes:

One draped vendor table in the foyer and one draped vendor table in the exhibit hall, two tickets *plus two additional attendee tickets*, opportunity to introduce the keynote speakers, half page ad in program, recognition in printed materials, signage, website and from podium.

\_\_\_\_\_ One Available

### Name Badge Sponsor (SOLD: Humana)

**\$2,500**

Includes:

One draped vendor table, two tickets *plus two additional attendee tickets*, half-page ad in program, logo printed on attendee badges and lanyards, recognition in printed materials, signage, website and from podium.



**Bingo Card Sponsor (SOLD: Care 1st)**

**\$2,500**

Includes: One draped vendor table, two tickets *plus two additional attendee tickets*, half-page ad in program, collect bingo cards from agents and present winning agent entry with gift, recognition in printed materials, signage, website and from podium.

**Grand Prize Sponsor (SOLD: Boomers Insurance Services)**

**\$2,500**

Includes: One draped vendor table, two tickets *plus two additional attendee tickets*, half-page ad in program, collect grand prize raffle tickets, announce and present grand prize to winner, recognition in printed materials, signage, website and from podium.

**Continental Breakfast Sponsor (Sold: Aetna)**

**\$2,500**

Includes: Breakfast tables with vendor's tablecloths. One draped vendor table, two tickets *plus two additional attendee tickets*, quarter-page ad in program, recognition in printed materials, signage, website and from podium.

**Registration Packet Sponsor (SOLD: SCAN)**

**\$2,000**

Includes: One draped vendor table, two tickets *plus two additional attendee tickets*, half-page ad in program, logo printed on attendee name packet label, recognition in printed materials, signage, website and from podium.

**Registration Table Sponsor**

**\$2,000**

Includes: One draped vendor table, two tickets *plus two additional attendee tickets*, half-page ad in program, your table cloth on registration tables, recognition in printed materials, signage, website and from podium.

\_\_\_\_\_ One Available

**Membership Table Sponsor**

**\$2,000**

Includes: One draped vendor table, two tickets *plus two additional attendee tickets*, quarter-page ad in program, recognition in printed materials, signage, website and from podium.

\_\_\_\_\_ One Available

**Certified Education (CE) Sponsor (SOLD: EPIC Management, LP)**

**\$2,000**

Includes: One draped vendor table, two tickets *plus two additional attendee tickets*, quarter-page ad in program, recognition in printed materials, signage, website and from podium. Sponsor logo on all CE

**Audio Visual Sponsor**

**\$1,500**

Includes: One draped vendor table, two tickets *plus two additional attendee tickets*, quarter-page ad in program, recognition in printed materials, signage, website and from podium.

\_\_\_\_\_ One Available

**Decoration Sponsor**

**\$1,500**

Includes: One draped vendor table, two tickets *plus two additional attendee tickets*, quarter-page ad in program, recognition in printed materials, signage, website and from podium.

\_\_\_\_\_ One Available

**Printed Programs Sponsor**

**\$2,000**

Includes: One draped vendor table, two tickets *plus two additional attendee tickets*, quarter-page ad in program, recognition in printed materials, signage, website and from podium.

\_\_\_\_\_ One Available

**Refreshments Sponsor (SOLD: Blue Shield of CA)**

**\$1,500**

Includes: One draped vendor table, two tickets *plus two additional attendee tickets*, quarter-page ad in program, recognition in printed materials, signage, website and from podium.

**Sponsor Payment Options: Complete the Fee Schedule Page, along with the Sponsorship Page and mail back with a check to the address listed below, or fax/email with credit card payment to:**

**Orange County Association of Health Underwriters (OCAHU)**

**1442 E. Lincoln Avenue, PMB 441 | Orange, CA 92865-1934**

**Tel: (866) 921-6440 | Fax: (858) 408-2671**

**orangecountyahu@yahoo.com**