

# DUE DILIGENCE CONFERENCE



The Phoenician Resort  
6000 E. Camelback Road  
Scottsdale, AZ 85251

July 12-14, 2024

## SPONSOR REGISTRATION

Completed form & payment of fees confirms Sponsor's participation.  
The following information will be used for correspondence and printed materials only.

**Sponsor:** \_\_\_\_\_  
**Attendee:** \_\_\_\_\_  
**Title:** \_\_\_\_\_  
**Address:** \_\_\_\_\_  
**City, State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_  
**Phone:** \_\_\_\_\_ **E-Mail:** \_\_\_\_\_  
**Website:** \_\_\_\_\_

**Check-In Date:** \_\_\_\_\_ **Check-Out Date:** \_\_\_\_\_

**Occupancy:** Single  Double Room   
**Bed Size:** King  Two Double Beds   
**Spouse/Guest:** Yes  Guest Name \_\_\_\_\_

**Room Rate:** \$193.00 + taxes per night

## Additional Firm Participant (if applicable)

**Sponsor:** \_\_\_\_\_  
**Attendee:** \_\_\_\_\_  
**Title:** \_\_\_\_\_  
**Address:** \_\_\_\_\_  
**City, State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_  
**Phone:** \_\_\_\_\_ **E-Mail:** \_\_\_\_\_

**Additional Room Required:** Yes:  No:  **Room Rate:** \$193.00 + taxes.

**Check-In Date:** \_\_\_\_\_ **Check-Out Date:** \_\_\_\_\_

**Occupancy:** Single  Double Room   
**Bed Size:** King  Two Double Beds   
**Spouse/Guest:** Yes  Guest Name: \_\_\_\_\_

## Sponsor Registration Information

Registration Fees: \$9,250.00 for one Sponsor Attendee; \$725.00 for each additional Sponsor Attendee.

Sponsor Invoice: Payment is due as stated on the Invoice.

Room Reservations: Group room rates are \$193.00 + taxes and will be held for 2 days before the Conference, subject to availability. Room nights after the Conference are subject to availability and price. Reservations are made by TNDDA and are at Sponsor's expense upon check-out. Check-in is after 4:00PM; check-out time is 11:00AM.

**TNDDA's Room Block is private: reservations must be made through TNDDA, not the Hotel.**

**To reserve, cancel or revise your room dates, please call Terry Odem at TNDDA: the Hotel will not make any room reservations or changes requested by the Attendee.**

Room Cancellation: 72 hours' notice is required to AVOID a one-night cancellation penalty.

Transportation: Transportation to & from the Conference is the responsibility of the Attendee.

Meals: All meals are complimentary. Attire: Conference functions are Business Casual.

Premium Sponsorship: Platinum, Gold, Silver, Bronze (Premium Sponsors Page 4).

## Sponsor Exhibits

Sponsor Exhibits: Three 45-minute Exhibit Sessions will be held in Salon L on Friday & Saturday. Sponsors will be given a 6' table for their tabletop displays, signs & sponsor materials.

Exhibit Set-up Time is from Friday, 11:00AM - 3:00PM.

Exhibits Tear-down is on Saturday, 4:00PM. Bring your Fed-X or UPS Senders Account number & labels to ship packages home.

## Audio Visual

Presentations are 25 minutes with a 5-minute follow-up on the last day.

Save PowerPoint presentations on a **USB** and bring to conference.

Audio Visual support will be provided for your use including a laptop & projector.

Audio Visual projection aspect ratio will be 16.9 which is a wide screen view.

## Sponsor Agenda Information (Required)

FOR BROKER DEALER AND ADVISOR USE ONLY; NOT FOR PUBLIC DISTRIBUTION.

Sponsor Name: \_\_\_\_\_

Offering Name: \_\_\_\_\_

Asset Class: \_\_\_\_\_ Sub Asset Class: \_\_\_\_\_

Assets Under Management: \_\_\_\_\_ Aggregate Historical IRR: \_\_\_\_\_

Investment Strategy: \_\_\_\_\_

\_\_\_\_\_

Offering Structure: \_\_\_\_\_

Offering: Min/Max/Raised to Date/Escrow Broken:

\_\_\_\_\_

Offering Fee Structure: Front-End Load/Commissions:

\_\_\_\_\_

Investor Qualifications - Accredited/Non-Accredited: \_\_\_\_\_

Audited Financials? Sponsor/Offering: \_\_\_\_\_

Investor Protections:

\_\_\_\_\_

\_\_\_\_\_

Do you have a managing Broker/Dealer: Yes \_\_\_\_\_ No \_\_\_\_\_

MBD Name: \_\_\_\_\_

Third Party Report – include date and author of report (s):

\_\_\_\_\_

\_\_\_\_\_

Listed with AI Insight? Yes \_\_\_\_\_ No \_\_\_\_\_

## Premium Sponsorships

**[ ] Platinum: \$1,500.00**

Sponsorship of Saturday Night Dinner  
Premium Sponsorship Signage with your Logo  
Recognition in Conference Agenda  
First Call on Presentation Time  
Preferred Sponsor Exhibit Placement

**[ ] Gold: \$1,250.00**

Sponsorship of Friday Night Reception  
Premium Sponsorship Signage with your Logo  
Recognition in Conference Agenda  
Second Call on Presentation Time  
Preferred Sponsor Exhibit Placement

**[ ] Silver: \$1,000.00**

Sponsorship of Saturday Lunch  
Premium Sponsorship Signage with your Log  
Recognition in Conference Agenda  
Third Call on Presentation Time  
Preferred Sponsor Exhibit Placement

**[ ] Bronze: \$750.00**

Sponsorship of Saturday & Sunday Breakfasts  
Premium Sponsorship Signage with your Logo  
Recognition in Conference Agenda  
Fourth Call on Presentation Time  
Preferred Sponsor Exhibit Placement

**PLEASE CHECK ONE OF THE ABOVE SPONSORSHIPS:**

- One of each of these Premium Sponsorship spots is available and will be accepted on a first come first serve basis.
- The Premium Sponsorship cost will be included in your Invoice. Premium Fees are in addition to Regular Sponsor Fees. You will be contacted regarding your Presentation time selection and the use of your Logo.
- Confirmation and invoice will be emailed to Sponsor.

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**Sponsor Signature**

Complete form and E-mail to [terry@tndda.com](mailto:terry@tndda.com).



## **SPONSOR GUIDANCE**

**Conference Introduction:** We highly recommend that Sponsors attend the Conference Introduction, beginning at 3:00pm on Friday, in order to get the full benefit from the Conference.

**Presentation Time:** Presentations are 25 minutes in length. You will be advised at the end of 20 minutes to ask the audience if there are any questions. Unused question time can be used to complete your presentation. Additional questions may be generated by our members during our Closed Member Sessions. These questions will be handed out to the Sponsor in written form to be addressed during your 5 minutes time slot on our Sunday *Sponsor Final Thoughts* Session.

**Who should make the Presentation:** Your presentation should ideally be made by a member of senior management who is directly involved with implementing your investment strategy. While marketing or fundraising staff members or Managing Broker Dealer representatives are an important part of the process, your audience is looking for direct access to those in charge of implementing your investment strategy.

**Presentation Goal:** To provide the information necessary to persuade TNDDA Members to enter into the Due Diligence Process with you, with the execution of a Selling Agreement being the ultimate goal.

**Know your Audience:** You will be presenting to seasoned “decision makers” that know the basics. Typical titles are: Founder, Chairman, CEO, President, COO, CCO, Due Diligence Officer, Director Alternative Investments, Managing Principal, Partner and Director. These “decision makers” are responsible for what Sponsor Offerings are added to their firm’s Approved Products list. They are looking for what is unique about your firm/structure relative to others in your space, and what investor protections are contained in your investment structure.

**Presentation Content:** In this order: 1.) A quick summary of your current offering and offering structure, to set the stage for your presentation. 2.) A history of the people involved in the execution of your investment plan. 3.) What is the financial strength of the “offeror”? 4.) What is your “prior performance history” on the plan you will be implementing with investor dollars?

**Presentation Style:** Styles range from a single person informal oral presentation to a multi-person team presentation with PowerPoints, literature handouts, etc. The best presentation style is the one the presenter is most comfortable with.

**Private Events:** To ensure equal access to our Members, we ask that Sponsors not invite Members and Members not accept invitations to private events during our Conference Program.

**Don’t Forget:** Participation in all Conference events is important as it can provide several opportunities to meet and get to know our Members: Conference Introduction, five meals including two social events, Sunday Sponsor Final Thoughts, and most important, the three Sponsor Exhibit Sessions.