



SurePrep[®]
Transform

SPONSOR PROSPECTUS

Connect with Leading
Technology-Driven Firms

Loews Coronado Bay Resort
Coronado, CA
October 23-25, 2022



TABLE OF CONTENTS

About SurePrep	03
About SurePrep Transform.....	04
Audience Overview.....	05
Sponsorship Comparison.....	06
Contact Us.....	07
Application Form.....	08

ABOUT SUREPREP

SurePrep LLC was founded in 2002. We are the leader in 1040 tax automation software and services. Our clients include CPA firms, wealth management firms, and other tax professionals that process 1040s. By emphasizing innovation, SurePrep provides the most comprehensive 1040 productivity solutions on the market. These include scan-and-populate with an optional OCR verification service, tax preparation outsourcing, advanced workpaper management software, and a mobile solution that eliminates the traditional tax organizer.

Our solutions are used by over 23,000 tax professionals at firms of all sizes, from three of the Big 4 to sole practitioners.

SurePrep's software solutions are 1040SCAN, SPbinder and TaxCaddy. Our service solutions include both full and partial tax preparation outsourcing, available onshore and offshore.

SurePrep software and services help accounting firms increase productivity and profitability while promoting a completely digital tax workflow. Our solutions maximize automation to streamline the entire 1040 tax process for both tax professional and taxpayer. No other tax automation software vendor competes with SurePrep's technological edge. Our technology is covered by numerous United States Patents, including United States Patent Numbers 7,454,371; 7,610,227; 7,636,886; 7,720,616; 7,769,646; 7,853,494 and RE45007.



ABOUT SUREPREP TRANSFORM

SurePrep Transform is an immersive 3-day conference on the latest technological advancements in digital tax return preparation.

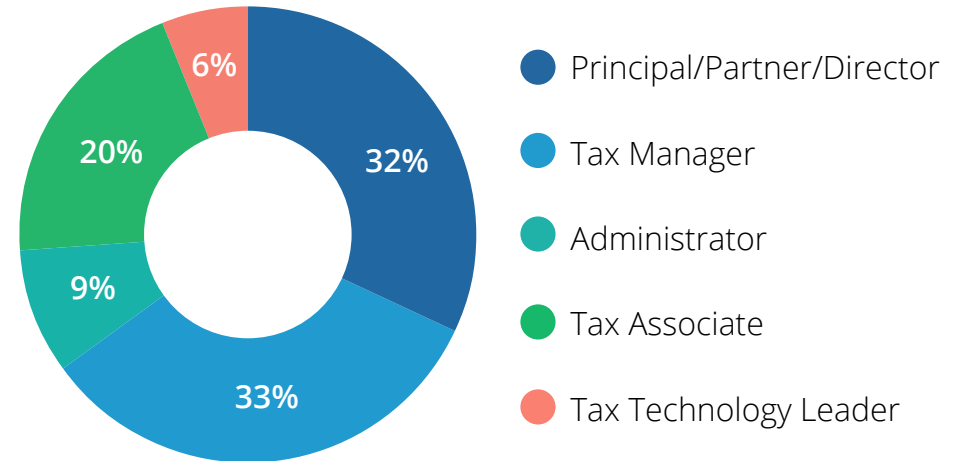
Sessions will cover advanced digital tax return preparation topics with a practical focus on actionable steps. Participants will learn how to leverage the latest advancements in automation, implement best practices, and adapt to the future. Between sessions, the scenic beach-side hotel provides ample opportunity to connect with like-minded professionals.

Artificial Intelligence and Machine Learning are fueling digital disruption in the 1040 space. See the latest product demos and attend Q&As with innovators. The strategic insights you gain at SurePrep Transform will help your firm foster growth, overcome staffing shortages, and streamline workflows.

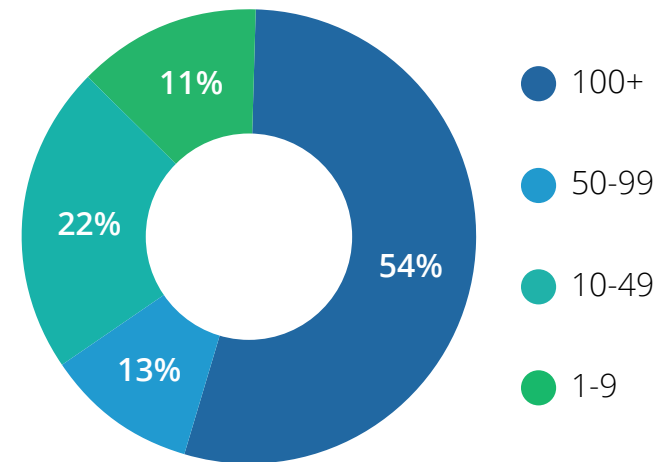


AUDIENCE OVERVIEW

Attendee Titles



Attendee Firm Sizes



SPONSORSHIP COMPARISON

	Platinum	Gold	Silver
Booth Space	10' Booth	6' Booth	6' Booth
Attendee Badges	3 Badges	2 Badges	1 Badge
Lead Capture App	✓	✓	✓
Logo on Event Website	✓	✓	✓
Banner Ad on Event Website	✓	✓	
Speaking Opportunity	✓		
Price	\$12,500	\$5,500	\$4,000

Add-On Sponsorship Opportunities:

- Welcome Reception: Signage & Logo on Cocktail Napkins – \$1,500
- Social Event Cocktail Reception: Signage & Logo on Cocktail Napkins – \$2,000
- Breakfast or Lunch: Signage (4 available) – \$1,000
- Refreshment Breaks: Signage (4 available) – \$1,000
- Additional Attendee Badge: Available at current Registration Fee

Exhibit Hall Highlights:

- Networking Receptions
- Breakfasts
- Lunches
- Refreshment Breaks

Note: All sponsorships include a 6' table, 2 chairs, 1 wastebasket, access to electrical outlets and Wi-Fi. If additional AV needs are required, please contact the [Event Administrator](#). There may be an extra cost for additional AV needs.

Security: The exhibition areas will not be locked when not in use. Sponsors are encouraged to either remove or secure items from the exhibitor space at the close of each event day. SurePrep and the host facility will not be held liable for any damage or disappearance of any property held at the booth.

Shipping: All costs associated with the shipping and storage of event material are the responsibility of the sponsor. Shipping instructions will be sent to the sponsor four weeks prior to the event. It is the sponsor's responsibility to pack up all boxes for shipping and arrange a scheduled pick up. SurePrep is not liable for any lost or damaged packages.

CONTACT US

Join us at SurePrep Transform and connect with attendees from the leading technology-driven firms invested in transforming their tax practice.

For sponsorship inquiries and other questions about the event, please reach out to:

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Join us on social media.

#surepreptransform2022



@SurePrepLLC



linkedin.com/company/sureprep-llc



2022 SPONSOR APPLICATION

Loews Coronado Hotel
4000 Coronado Bay Road
Coronado, CA 92118
October 23-25, 2022

Return completed form to
cathleen.foley@sureprep.com and
we will contact you to confirm your
sponsorship.



Sponsorship liaison and logistics:

Name:

Email:

Title:

Company:

Address:

City: State: ZIP:

Phone: Website:

Exhibitor Booth or Other Sponsorship Opportunity		Sponsor Fee	Total
<input type="checkbox"/>	Platinum	\$12,500	
<input type="checkbox"/>	Gold	\$5,500	
<input type="checkbox"/>	Silver	\$4,000	
<input type="checkbox"/>	Welcome Reception: Signage & Logo on Cocktail Napkins	\$1,500	
<input type="checkbox"/>	Cocktail Reception: Signage & Logo on Cocktail Napkins	\$2,000	
<input type="checkbox"/>	Breakfast or Lunch: Signage	\$1,000	
<input type="checkbox"/>	Refreshment Breaks: Signage	\$1,000	
		Total Fees:	

Note: Sponsors are strictly forbidden from planning any activities with attendees that conflict with the SurePrep Transform agenda and social events.