



## Annual Sales Symposium

### Taking Care of Business: Elevating Your Game

Hard to believe that a year has passed so quickly and that it is time for Orange County's most popular and attended event for insurance agents and industry professionals. OCAHU is proud to host its annual Sales Symposium. In this information packet, you will find everything you need to reserve your exhibit space.

#### ***Kick off 2022 with the Largest and the Best!!***

The date: **Friday, February 11, 2022**  
The location: Lake Forest Community Center  
The address: 100 Civic Center Drive, Lake Forest 92630  
The time: 9 AM – 4 PM

2021 will be a year to remember for all of us. We had to change our ways of thinking and our ways of doing business. We learned how to use Zoom to conduct agent and client meetings. Many of us learned, if necessary, we could effectively work from home.

2022 brings a new year and we are anxious to be back to normal. There is no better time to connect with agents and other health insurance professionals than at the OCAHU Sales Symposium. We have an exciting program to help our members Take Care of Business in 2022.

We expect agents from the IFP, Medicare, Group and Ancillary products market in attendance. They will look forward to meeting you, to see how you can help them Elevate Their Game.

We invite you to join us for a fun yet informative "game themed" event at a new venue!

**Table space is very limited (27 tables)**, and exhibitor visit time has been expanded to insure maximum exposure. Get your forms and deposit in now to secure your place in this first-class event! Your participation is vital!

Great C.E. Topics! Great Information! Great Prizes! Great Opportunities! This is a must attend event for your company! Visit us on the web at [www.ocahu.org](http://www.ocahu.org).

Best,

*Jo Ann*

Jo Ann Vernon  
President, OC Assoc Health Underwriters  
[jvernon@bxall.com](mailto:jvernon@bxall.com)

*Pat*

Patricia Stiffler  
Chairperson, Business Development Summit  
President-Elect, OC Assoc Health Underwriters  
[pat@optionsininsurance.com](mailto:pat@optionsininsurance.com)

# THE ORANGE COUNTY ASSOCIATION OF HEALTH UNDERWRITERS

## Annual Sales Symposium

### **2022 Exhibitor Application**

This application is made on the \_\_\_\_\_ day of the month of \_\_\_\_\_, 2021 and/or 2022 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 (herein called OCAHU) 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, booth rental shall be provided to the above referenced Exhibitor for the OCAHU Annual Sales Symposium scheduled to be held at the Lake Forest Community Center (Conference Center), 100 Civic Center Drive, Lake Forest CA 92630 on Friday, February 11, 2022.

2) TABLE LOCATION: We offer twenty-seven (27) vendor tables that will be available for **tabletop displays**. SPACE IS LIMITED! RESERVE TODAY! OCAHU reserves the right to automatically assign the table locations upon receipt of completed contract and payment. OCAHU also reserves 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. **\*\*Please note the exhibit space will not include full pipe-and-draped exhibit booths. Due to limited space, large displays and/or banners will not be allowed behind the tables. This is a TABLETOP display event only. Any tabletop display and/or banner cannot exceed 3-ft in height. Each exhibit space will include (1) 6-ft table and 2 chairs.**

OCAHU 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 near: \_\_\_\_\_.

I prefer not to be near: \_\_\_\_\_.

3) YOUR OFFICIAL IDENTIFICATION: Exhibitor agrees to let the Summit and OCAHU 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.

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(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 6' table space includes:

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

**OPTIONAL FEATURES:** Electricity is an optional service provided at no cost and limited to a total of 15 tables (first come, first served). You must bring your own power strip and/or extension cord. Will you need electricity?

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

WiFi is an optional service available at \$50 per table. Will you need WiFi?

\_\_\_\_\_ 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 to the Lake Forest Community Center or OCAHU is prohibited.** Your company representative will need to arrange package handling on own.

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

7) PLACE AND NATURE OF EXHIBIT: Display booths 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. Approval must first be obtained from the local fire department for the use, operations, or presence of electrical, mechanical, or chemical device, which in the opinion of the local fire department or the official exhibit contractor might be hazardous in a public place.

8) RESTRICTION AND LOCATION OF EXHIBITS: OCAHU reserved the right to require any exhibitor to remove any part thereof, which in the sole judgment of OCAHU 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 needed for the good of the conference and its exhibit. The restriction includes any persons, things, conduct, printed material, or anything of character, which may be objectionable to the exhibit. In the event of such restriction or eviction, OCAHU is not liable for any refunds or rentals or other Exhibition expenses.

9) BOOTH PAYMENT AND CANCELLATION: It is hereby agreed to that an exhibit space may be reserved by Exhibitor at a fee of \$600 if postmarked by 1/31/2022 or \$750 for exhibit space for exhibit postmarked after 1/31/22. **Payment in full must be submitted 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, as its election may cancel the contract and retain the full contract fee.

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

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

12) FAILURE TO OCCUPY SPACE: Any space which is not occupied by the exhibiting company February 11, 2022, at 9:30 AM will be forfeited by the exhibitor and the space may be resold or used by OCAHU without refund, unless previous arrangements for delayed occupancy have been made in writing by OCAHU and the participating exhibiting company.

13) LIABILITY AND INSURANCE: OCAHU, 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 after 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 losses, damage or injury upon signing the contract. The exhibitor expressly releases the foregoing institutions, individuals, and committees for 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 losses by exhibitor.

14) 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.

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

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

17) BADGES: Badges for your exhibit personnel will be made from the list you submit to OCAHU. Conference badges identify you and are in evidence always during the show. Should the names of the attendee's change, and to ensure a printed badge, the exhibiting company must notify OCAHU in writing at least five (5) days prior to the exhibit opening.

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

19) REGISTRATION & NAME TAGS: Please list all company representatives who will be attending the Conference and representing your company at your booth. Please list any additional representatives or guests as additional attendees below for nametags and conference registration and information. Be sure to include \$60 for each additional guest or attendee if postmarked by January 31, 2022.

**AUTHORIZED SIGNATURE OF EXHIBITOR:** \_\_\_\_\_  
(I have read, understand, and agree to the rules and regulations regarding the OCAHU exhibit program).

**Questions? Contact:**

**Pat Stiffler, Annual Sales Symposium Chairperson at [keystonepatty@aol.com](mailto:keystonepatty@aol.com)**

**OR**

**Gail James Clarke, Executive Director at (714) 441-8951, ext. 3 or [orangecountyahu@yahoo.com](mailto:orangecountyahu@yahoo.com)**

## OCAHU 2022 EXHIBTOR FEE SCHEDULE PAGE

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

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

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

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

(In the space above, print the name of your company as you would like it to appear on the sign over your booth. 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 Booth

\_\_\_\_\_ Postmarked by January 31, 2022 \$600 X \_\_\_\_\_ = \_\_\_\_\_.

\_\_\_\_\_ Postmarked after January 31, 2022 \$750 X \_\_\_\_\_ = \_\_\_\_\_.

\_\_\_\_\_ Electrical Outlet  
(Available to the first 15 requests. You must bring your own power strip and/or extension cord.)

\_\_\_\_\_ Internet Service (If Applicable) \$50 X \_\_\_\_\_ = \_\_\_\_\_.

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

\_\_\_\_\_ Postmarked by January 31, 2022 \$60 X \_\_\_\_\_ = \_\_\_\_\_.

\_\_\_\_\_ Postmarked after January 31, 2022 \$75 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 (\$60 each by January 31, 2022 | \$75 each after January 31, 2022)

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

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

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

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

<b>PAYMENT PREFERENCE</b>
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- Check Payment: Email completed form to reserve space. Mail check payment to address listed above.
- Credit Card Payment: Email completed form to reserve space. An invoice from Square to pay it directly online with a card or bank ACH will be sent to you after OCAHU receives completed form.

<b>Email Completed form to <a href="mailto:orangecountyahu@yahoo.com">orangecountyahu@yahoo.com</a></b>
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## **Annual Sales Symposium**

### **Program Advertisement Rates and Specs**

<b>Ad Size</b>	<b>Fees</b>
Full Page (Color - 8 x 10")	\$550.00
Half Page (Color - 8 x 5" horizontal)	\$400.00
Quarter Page (Color - 4 x 6" vertical)	\$200.00
Business Card (Color)	\$125.00

All other ads are Color, Hi-Quality JPG or Hi-Res PDF files. **The ads must reach the Association office (orangecountyahu@yahoo.com) no later than Friday, January 31, 2022.**

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## POWER Partnerships

### **Gold Show Partner - \$3,500 | [SOLD! Colonial Life](#)**

Includes two 6-ft tables + four chairs, four tickets *plus* four additional attendee tickets, podium signage, your pull-up banner at each podium (3), opportunity to speak at podium at a general session, color inside front cover program ad, recognition in printed materials, signage, website and from podium, company welcome video in promotional emails, and in rolling sponsor loop in general session area.

### **Lunch Service Partner - \$2,500**

Includes one 6-ft table + 2 chairs, two tickets *plus* two additional attendee tickets, luncheon napkin with your logo printed, color outside back cover program ad, recognition in printed materials, signage, website and from podium.

**One Available**

### **Happy Hour Partner - \$2,500 | [SOLD! VSP Individual Plans](#)**

Includes one 6-ft table + 2 chairs, two tickets *plus* two additional attendee tickets, 1 drink ticket per person with your logo printed, color inside back cover program ad, recognition in printed materials, signage, website and from podium.

### **Keynote Speaker Partner - \$2,000**

Includes one 6-ft table + 2 chairs, two tickets *plus* two additional attendee tickets, opportunity to introduce the keynote speakers, color full-page program ad, recognition in printed materials, signage, website and from podium.

**One Available**

### **Name Badge Partner - \$2,000 | [SOLD! Word & Brown](#)**

Includes one 6-ft table + 2 chairs, two tickets *plus* two additional attendee tickets, color full-page program ad, logo printed on attendee badges and recognition in printed materials, signage, website and from podium.

### **Registration Bag Partner - \$2,000**

Includes one 6-ft table + 2 chairs, two tickets *plus* two additional attendee tickets, color half-page program ad, your company bag given to each attendee (300), recognition in printed materials, signage, website and from podium.

**One Available**

# OCAHU Annual Sales Symposium



## PROMOTER Partnerships

### **Bingo Card Partner - \$1,750**

Includes one 6-ft table + 2 chairs, two tickets, color half-program ad, opportunity to collect bingo cards from agents and present winning agent entry with gift, recognition in printed materials, signage, website and from podium.

**One Available**

### **Grand Prize Partner- \$1,750**

Includes one 6-ft table + 2 chairs, two tickets, color half-page program ad, opportunity to collect grand prize raffle tickets, announce and present grand prize to winner, recognition in printed materials, signage, website and from podium.

**One Available**

### **Registration Table Partner - \$1,750 | [SOLD! Dickerson Insurance Services, An Alera Group Company](#)**

Includes one 6-ft table + 2 chairs, two tickets, color half-page program ad, brand advertising at registration tables, recognition in printed materials, signage, website and from podium.

### **Audio Visual Partner - \$1,750**

Includes one 6-ft table + 2 chairs, two tickets plus, color half-page program ad, recognition in printed materials, signage, website and from podium. Footer logo on slide presentation.

**One Available**

### **Continental Breakfast Partner - \$1,750**

Includes one 6-ft table + 2 chairs, two tickets, color quarter-page program ad, your company tablecloth on breakfast table, recognition in printed materials, signage, website and from podium.

**One Available**

### **Refreshments Partner - \$1,500**

Includes one 6-ft table + 2 chairs, two tickets, color quarter-page program ad, your company tablecloth on refreshments table, recognition in printed materials, signage, website and from podium.

**One Available**



# OCAHU Annual Sales Symposium



## PROMOTER Partnership

### **Printed Program Partner - \$1,250**

Includes one 6-ft table + 2 chairs, color full-page program ad, recognition in printed materials, signage, website and from podium. Thank you to our printed program sponsor in header or footer of ad.

**One Available**

### **Membership Table Partner - \$1,250**

Includes one 6-ft table + 2 chairs, two tickets, color quarter-page program ad, recognition in printed materials, signage, website and from podium. Logo recognition on membership application.

**One Available**

### **Photography Partner - \$1,250**

Includes one 6-ft table + 2 chairs, two tickets, color quarter-page program ad, recognition in printed materials, signage, website and from podium. Logo recognition on membership application. Logo on ticket used to get professional headshot taken.

**One Available**

***Partnership Payment Options: Complete the Fee Schedule Page, along with the Partnership 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: (714) 441-8951, ext. 3 | Fax: (858) 408-2671 | orangecountyahu@yahoo.com**