

Sponsorship Request Form

Name of Advisor or Advisor Team: _____
(Type or Print)

It is important that you notify the Company if you are, or plan to be, involved in any event, community, or sporting sponsorships. This request must be made prior to engaging in the activity.

Please provide a copy or proof of any signage for the event, complete, sign and date this request form and return it to the Compliance department for approval. You may not proceed with the event until you have received approval. A copy of this form, once approved, should be retained for your records and changes should be promptly reported to the Compliance department.

- Event/Sponsorship Name: _____
- Event Date(s): _____
- Sponsorship Amount (*please attach any literature describing sponsorship levels or benefits included with each level of sponsorship*): \$ _____
- Nature of the Event (*i.e., golf tournament, youth sports, charity event, etc.*): _____
- Will the Inspire Advisors logo (or your DBA logo) be used on any event signage or marketing (*banners, table toppers, fliers, directories, etc.*)? YES NO
- If YES, have you attached a copy or proof of the signage for review? YES NO
- Do you have any clients or client prospects associated with this event? YES NO
- If YES, please list their name(s): _____
- Do you have a financial interest in this event? YES NO
- If YES, please explain: _____

FOR COMPLIANCE USE ONLY

Date Received and Reviewed: _____

Comments: _____

Approved: YES NO

Documented in Redtail: YES NO

Method of Payment: Personal BDA

Has Finance been notified? YES NO

Compliance Signature

Date