

TBC Event Request Form



an ascensus® company

Meeting Type *(check all that apply):*

- Onsite Presentation
- Live Webinar (Time Zone: _____)
- Pre-Recorded Webinar

GENERAL INFORMATION

Please complete one request per employer and return to new@benefitprojects.com. For more than three locations, complete additional request forms or attach an info sheet.

Senders Contact Information

Plan Name _____
Contact Name _____
Phone _____ Email _____

Company Contact *(if different than Senders Contact Information above)*

Contact Name _____ Company Name _____
Phone _____ Email _____

Financial Advisor Name *(if applicable)* _____

Phone _____ Email _____

Please provide detail on the level of involvement the financial advisor will have in the meetings, if any:

Special Requirements

Please indicate meeting or leader requirements (languages, educational certifications, presentation format, etc.) Attach additional sheet if necessary.

Audio and Visual Needs *(e.g., USB cord, projector, etc.)*

ALTERNATIVE DATES AND BILLING INFORMATION

Alternate Meeting Date(s) _____ Time(s) _____

Alternate Meeting Date(s) _____ Time(s) _____

Invoice Contact

Please invoice the following person.

Name _____ Company _____

Street Address _____ City/State/Zip _____

Phone _____ Email _____

To pay by credit card, please call the phone number included on the invoice.

Email sent through the Internet is not secure. Do not use email to send Total Benefit Communications® (TBC) confidential information such as credit card numbers or other such personal information. Your email messages are subject to review by TBC, its officers, agents, and employees.

You understand and agree that TBC will bill you directly for all fees and expenses related to the services requested herein. You agree to be solely responsible for paying all such fees and expenses. You understand that if you cancel the event more than 4 business days before the assignment start date you will be charged incurred expenses, if you cancel the event between two to four business days before the assignment start date you will be charged \$300 plus all incurred expenses and if you cancel the event one business day or less before the assignment start date you will be charged full meeting fees plus incurred expenses. All plan materials will be developed and/or provided by you, at your expense, to TBC for the sole purposes of conducting the services hereunder. You hereby warrant and represent that all information provided in the materials is and will be up-to-date and accurate. TBC reserves the right to cancel any assignment in which its consultants do not obtain the necessary information or materials at least 24 hours before they are required to depart their base of operations for any assignment. You understand that TBC does not and will not provide any investment, tax, legal or accounting advice, or any product sales services. You agree to indemnify and hold harmless TBC and each of its affiliates, directors, officers, employees, shareholders, and agents against all losses, claims, damages, liabilities, or expenses (including reasonable attorneys' fees) arising out of your gross negligence or willful misconduct. TBC expressly disclaims all warranties of any kind, express or implied, with respect to the services provided hereunder, including the implied warranties of merchantability or fitness for a particular purpose. TBC will not be liable for any special, indirect, incidental, consequential, or similar damages, including lost revenue, lost profits, and lost or damaged data, even if TBC was advised of the possibility of such damages. TBC's aggregate liability for all damages whatsoever will not exceed the service fees TBC received pursuant to this request form before TBC receives written notice of the first damages claim. This limitation on TBC's liability will not apply to direct damages caused by TBC's fraud, gross negligence, or willful misconduct. By executing below, you acknowledge and agree to the terms and conditions specified herein. This request form is not intended to modify or amend the terms and conditions of any existing services agreement between TBC and you or your affiliate. The parties agree that facsimile signatures shall be deemed original signatures and legally binding.

Authorization

By _____ Date _____

Name _____ Title _____

Company _____

