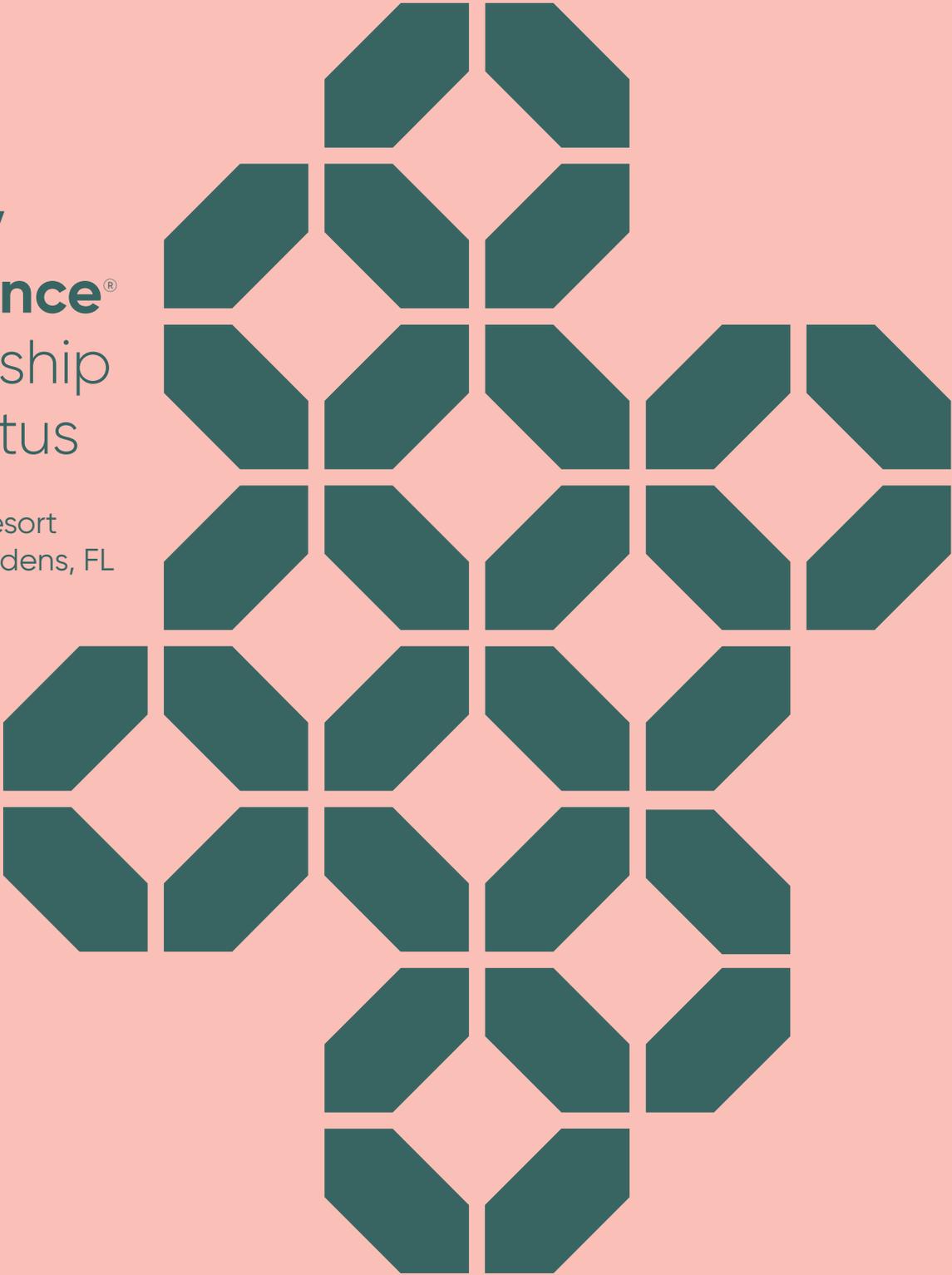


**Options  
Industry  
Conference<sup>®</sup>**  
Sponsorship  
Prospectus

PGA National Resort  
Palm Beach Gardens, FL  
May 6-8, 2025



# Welcome to the 2025 Options Industry Conference®

## Why Sponsor the Options Industry Conference?

The premier annual event for top-level management and trading professionals, the Options Industry Conference, is at the intersection of business and regulation, delivering what the industry needs to advance together, year after year.

We bring together the most diverse and accessible group of key industry professionals, influential speakers and top-quality content to curate an experience of connecting, learning and engaging. Whether you seek to expand your network, dive deep into new topics or share knowledge of your own, we provide the forum to achieve it all.

The Options Industry Conference is attended by senior level executives, decision makers, and representatives from all segments of the options business including:

- Exchanges
- Clearing firms
- Retail brokerage firms
- Institutional brokerage firms
- Trading and market maker professionals
- Financial technology firms
- Media

## 43rd Annual Options Industry Conference

The 2025 conference will be held in Palm Beach Gardens, Florida from **May 6-8, 2025**. Discussions will focus on the most relevant topics facing our industry today including trading challenges, regulatory impacts and technology solutions. Don't miss the opportunity to participate in the options industry's most impactful annual event by becoming a conference sponsor.

Enclosed is a comprehensive list of sponsorship opportunities to showcase your firm. Thank you in advance for your sponsorship consideration!

400

attendees  
on average

87%

average attendee  
return rate

30+

hours of sessions +  
networking events

98%

average sponsor  
return rate

# Sponsorship Opportunities

The Options Industry Conference offers an unparalleled opportunity to reach top-level management and trading professionals. The conference sponsorship program is designed to provide maximum visibility and recognition.

## **Sponsorship level is determined by the total amount of purchased sponsorships.**

For example, by reserving the Registration Bags (\$20,000) and the Water Bottle sponsorship (\$7,500), your company would earn a Gold Sponsor level.

Each individual sponsorship you select has its own set of inclusions, and if you qualify as a top-level sponsor, you are provided these additional benefits:

## Top Level Sponsor Benefits

### **Platinum** \$30,000+

- Three complimentary conference registrations – a **\$3,585 VALUE!**
- Complimentary spotlight banner advertisement on conference website
- Complimentary spotlight banner advertisement on two pre-conference emails
- Detailed description of your company's services on conference website
- Logo placement with link on conference website
- Logo placement on conference marketing materials and signage, including general session stage
- Access to conference registration list\*
- Sponsorship recognition through conference mobile app, including push notifications and enhanced listing

\*Access is subject to applicable privacy laws.

### **Gold** \$20,000+

- Two complimentary conference registrations – a **\$2,390 VALUE!**
- Complimentary spotlight banner advertisement on conference website
- Detailed description of your company's services on conference website
- Logo placement with link on conference website
- Logo placement on conference marketing materials and signage
- Access to conference registration list (no sooner than six weeks prior to event)
- Sponsorship recognition through conference mobile app, including push notification and enhanced listing

### **Silver** \$10,000+

- One complimentary conference registration – a **\$1,195 VALUE!**
- Detailed description of your company's services on conference website
- Logo placement with link on conference website
- Logo placement on conference marketing materials and signage
- Access to conference registration list (no sooner than six weeks prior to event)
- Sponsor listing in conference mobile app

### **Bronze** \$5,000+

- Detailed description of your company's services on conference website
- Logo placement with link on conference website
- Logo placement on conference marketing materials and signage
- Sponsor listing in conference mobile app

### **Supporter** \$2,500+

- Logo placement on conference signage
- Sponsor listing on website and in conference mobile app

*Note: Supporter level does not include purchased sponsorship item*

**For more information about these sponsorships, or to discuss an opportunity not listed here, please contact Tricia Perl at [pperl@theocc.com](mailto:pperl@theocc.com).**

# Sponsorship Opportunities

Be visible at the options industry's premier annual event by becoming a conference sponsor – we again will offer a range of traditional and destination-driven sponsorships.

## Event Sponsorships

### Afterhours Event – \$20,000 *NEW*

Sponsor the hottest ticket at PGA National! The afterhours party on Tuesday evening after our opening night event will be hosted in Birdie's, the hotel's retro diner adjacent to the golf course. The sponsorship includes one drink coupon for attendees, cocktail napkins, bar snacks, signage and push notifications. Sponsor can upgrade to provide a hosted bar for the duration of the evening.

### All-Day Beverage Station – \$15,000

Branded beverage station outside of general session will be available during all sessions on Tuesday, Wednesday, and Thursday. Includes branded coffee cups and prominent signage.

### *UPGRADED OPTION*

### Lobby Bar Sponsorship – \$12,500

The lobby bar's central location is the perfect place to relax or meet with colleagues. Conference attendees will receive a sponsor-branded complimentary drink ticket redeemable at the hotel's stylish social spot. Sponsorship also includes signage and other branding.

### Monday Registration Welcome – \$10,000

Prominent signage at meeting registration desk in the conference area, featuring drinks, snacks and music.

### Wednesday Lunch – \$10,000

Prominent signage and extras at the all-attendee lunch.

### Breakfast – \$5,000/Daily or \$8,000/Wednesday + Thursday

Branded breakfast table tents and prominent signage with company logo will be displayed in buffet area.

### Snack Breaks – \$3,000/daily or \$7,500/Tuesday, Wednesday + Thursday

Snack break will be held outside of the general session. Signage with company logo will be displayed on snack stands and napkins.



For more information about these sponsorships, or to discuss an opportunity not listed here, please contact Tricia Perl at [pperl@theocc.com](mailto:pperl@theocc.com).

# Sponsorship Opportunities

## General Sponsorships

### Registration Bags – \$20,000

Company logo will be displayed on conference registration bag, distributed to all attendees at registration.

### All Access Pass – \$20,000

Conference badge, distributed to all attendees at registration, will display sponsor logo on front and conference schedule on the back side. Branded lanyard included

### Keynote – \$20,000

Company logo will be displayed during keynote session. Includes the option for company representative to introduce session. Branded company notebook with pen distributed to all attendees, app push notification and meet and greet with sponsor invited attendees. Keynote selected by conference team; reach out to [Tricia Perl](#) for details.

### Check-in Experience – \$17,500

Company logo will be imprinted on hotel room keys, distributed to all hotel guests in branded key packet. Venue map will be branded with sponsor logo.

### UPGRADED OPTION

**General Session Seating – \$15,000/daily or \$35,000/Wednesday, Thursday + Friday**

Capture attendees' attention daily in general session. Includes soft seating areas, sponsor logo placed on chair-back covers and signs placed on highboy tables in the rear of general session.

### Conference Wireless Internet – \$12,500

Placard with company logo will be distributed to each attendee highlighting sponsorship of guest room internet and wireless internet in meeting space. Company logo and link featured on mobile app internet icon.

### Conference Attendee App – \$10,000

The Conference App will be the main tool for attendees to connect, build their schedule, and stay up to date on conference events throughout the week. Includes branded splash screen (viewable every time app is opened), link to sponsor website via home page icon, multiple rotating banner ads throughout the app and recognition on app launch emails. **79% of conference attendees logged into the app in 2024.**

### Late Night Munchies – \$7,500

Company branding with late night snacks delivered to each attendee guest room.

### Conference Survival Kit – \$7,500

Sponsor branding on reusable travel pouch featuring meeting survival essentials, such as sunscreen, pain reliever, gum, etc.

### Water Bottle Sponsor – \$7,500

Branded water bottle to be distributed to attendees in the conference bag. Water stations will be available in all conference areas for refilling.

### Veranda Lounge – \$7,500 *NEW*

Branded charging area in the covered outdoor space adjacent to the general session ballroom foyer, allowing attendees to relax and recharge in comfort.

### Atrium Lounge – \$6,000 *NEW*

Branded charging area in the sunlit atrium adjacent to registration, allowing attendees to relax and recharge in comfort.

**For more information about these sponsorships, or to discuss an opportunity not listed here, please contact Tricia Perl at [pperl@theocc.com](mailto:pperl@theocc.com).**

# Sponsorship Opportunities

## Conversation Nooks – \$5,000 **NEW**

Three branded intimate seating areas in the meeting space foyer, allowing attendees to take a break from the conference hustle for conversation or downtime.

## Panel Session Sponsorship – \$5,000

Five available sponsorships at \$5,000 each

Company logo will be displayed during selected panel presentation. Includes the option for company representative to introduce the panelists and session. Also includes conference app push notification to advertise session. Session sponsors will not have input as to panel topic or panelist selection.

## Turn Down Sponsor – \$5,000

Branded Do Not Disturb door hanger card combined with a branded pillow treat (Monday, Tuesday, and Wednesday nights). Can be supplemented with sponsor-provided branded item.

## Fitness Sponsorship – \$4,000 **NEW**

Reach your audience in an unexpected location! Includes signage, branded bottled water and sport towels in the hotel gym.

## Luggage Tag – \$4,000

Branded luggage tag provided to attendees. Also includes sponsorship of the bag check station made available to departing attendees on Thursday.

## General Room Drop – \$3,000/room drop

Opportunity to drop marketing materials and/or a logo promotion item in each attendee guest room. Limited to one item/bundle, i.e., one flyer, packaged giveaway, etc. Sponsor to provide item for delivery.

## Weather Sponsor – \$2,500

Branded card featuring tomorrow's forecast nightly on each attendee's pillow (Monday, Tuesday, and Wednesday). Can be supplemented with sponsor-provided branded item.

## Daily Update – \$2,000 per day/\$5,000 all days

Nightly electronic update to include the next day's sessions and activities, branded with sponsor logo, delivered to each attendee via email and conference app (Tuesday, Wednesday, and Thursday).

## General Session Chair Drop – \$2,000

Five available sponsorships at \$2,000 each

Drop marketing materials or a logo promotional item during the General Session on Tuesday, Wednesday, and Thursday.

## Registration Bag Insert – \$2,000

Include marketing materials or a logo promotion item in the registration bag, distributed to all conference attendees at registration. Size restrictions may apply.

## Conference Meeting Space – \$1,000 per day Tue/Wed, \$500 per day Thu **NEW**

Private meeting space available to include standard boardroom style setup. Any additional charges (F&B, AV, etc.) to be covered by the sponsor. Limited rooms available and sold on a first-come, first-served basis.

**For more information about these sponsorships, or to discuss an opportunity not listed here, please contact Tricia Perl at [pperl@theocc.com](mailto:pperl@theocc.com).**

# Sponsorship Opportunities

## Surf's Up – Wednesday Networking Event

Conference attendees will gather for an afternoon of networking with a laid-back vibe at the hotel's beautiful resort pool. Beachwear attire that says, "I'm ready to soak up the sun!" is appropriate, including board shorts, flip-flops and sunglasses. Ride the wave with an event sponsorship, but options are limited ensuring high visibility for sponsors. The conference will provide a beer/wine bar for all attendees. Sponsors are encouraged to offer food and beverage in their networking area (light bites, cool treats, specialty drinks, etc.).

### Pool Sponsorship – \$20,000

One available

Includes guest amenities at pool entrance (sunscreen/water/etc.), in-pool signage/seating and DJ entertainment.

### Sweet Treats & Game Area – \$20,000

One available

20'x20' area includes seating area, casual outdoor games and a cool sweet treat for attendees. Area will be branded.

### Ultra Cabana – \$15,000

One available

11'x11' cabana includes a seating area and will be branded. Includes wading pool seating and branding.

### Lawn Lounge – \$15,000

One available

20'x50' seating area with loungers and umbrellas. Area will be branded.

### Cabanas – \$10,000

Four available sponsorships at \$10,000 each

11'x11' cabanas include a seating area and will be branded.

### Swag Bag – \$3,500

One available

Company logo on tote available at entrance to hold promotional items, collateral materials, etc.

**In addition to specific branding noted above, all sponsors receive the following benefits:**

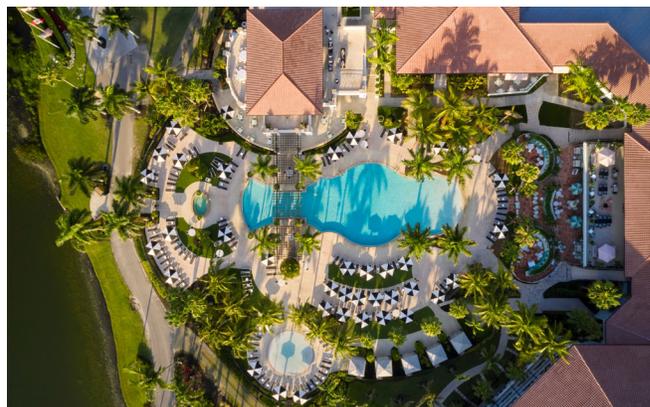
- Bar branding
- General signage in event area

## Thursday Pickleball

### Pickleball Mixer Sponsorship – \$5,000 **NEW**

This round-robin event will not only celebrate the fast-growing sport of pickleball but will serve as a great networking opportunity for our non-golfers.

- Company logo will be featured on racquets given to each player
- Company logo will be displayed on signage at the courts



**For more information about these sponsorships, or to discuss an opportunity not listed here, please contact Tricia Perl at [pperl@theocc.com](mailto:pperl@theocc.com).**

# Sponsorship Opportunities

## Thursday Golf Outing

### The Palmer – 'The King' of Golf Courses at PGA National Resort

Named after its legendary designer Arnold Palmer, this championship golf course is one of the more forgiving at PGA National Resort. It's also one of the most entertaining courses for players of all skill levels. There are plenty of opportunities for creative shot-making, and picturesque approach shots abound. Paired with a great series of finishing holes (including the stunning par 5 on the 18th), The Palmer golf course is all about risks/rewards and genuinely fun. Just like its namesake.

#### **Golf Beverage Carts – \$7,500/cart\***

Two available sponsorships at \$7,500 each

Beverage cart to feature company logo. Cart will distribute beverage koozies with company logo. Beverage costs are included in sponsorship.

#### **Golf Towels/Balls – \$7,500**

Company logo will be featured on towels and (1) sleeve of balls distributed to golfers.

#### **Golf Hospitality Bag – \$6,500**

Company logo will be featured on shoe bag distributed to golfers. Bag will hold all golf giveaways (towels, balls, etc.).

#### **Golf Cooling Towels – \$5,000 *NEW***

Company logo will be featured on cooling towels distributed to golfers and pickleball players.

#### **Golf Box Lunch – \$5,000**

Includes sponsorship of lunch for golfers. Company logo will be displayed, including branded lunch boxes and signage.

#### **Golf Cart Signs – \$5,000**

Golf carts will display company logo prominently on the cart exterior.

#### **Specialty Drink Hole – \$5,000**

Company logo will be displayed on signage at the tee area and pin flag. Beverage costs are included in sponsorship.

#### **Beat the Pro Hole – \$3,500**

Company logo will be displayed on signage at the tee area and pin flag. Golfers who hit their shot closer to the hole than the pro will win a prize. Prize(s) will be provided by the conference.

#### **Golf Holes – \$2,500/hole\***

13 available sponsorships at \$2,500 each

Company logo will be displayed on signage at the tee area and pin flag. Opportunity for sponsor to staff the hole, and sponsor is encouraged to provide activity or another draw for the hole. Sponsor will be responsible for any additional amenities or food and beverage.

#### **Golf Longest Putt Contest – \$2,500**

Signage displaying company logo located at the tee area.

#### **Golf Closest to the Pin Contest – \$2,500**

Signage displaying company logo located at the tee area.

#### **Golf Longest Drive Contest – \$2,500**

Signage displaying company logo located at the tee area.

**For more information about these sponsorships, or to discuss an opportunity not listed here, please contact Tricia Perl at [pperl@theocc.com](mailto:pperl@theocc.com).**

2025 Options Industry Conference

# Sponsorship Agreement

May 6–8, 2025



# Sponsorship Agreement

May 6–8, 2025

This Sponsorship Agreement for the 2025 Options Industry Conference (“Conference”) is between The Options Clearing Corporation (“OCC”), with offices located at 125 South Franklin Street, #1200, Chicago, Illinois and the sponsor listed below (“Sponsor”), collectively referred to as the (“Parties”). This Sponsorship Agreement incorporates by reference the Terms and Conditions attached as Exhibit A (collectively the “Agreement”) and represents the full and complete understanding between the Parties concerning the Conference.

## SPONSORSHIP SELECTION

Platinum

Gold

Silver

Bronze

Supporter

**Sponsorship Item(s)**

**Total Sponsorship Fees**

## SPONSOR / CONTACT INFORMATION

### Contact Information

**Sponsor Entity Legal Name**

**Sponsor Address** (Address, City, State, Zip)

**Contact Name/Title**

**Email**

**Phone**

### Sponsor Conference Logistics Contact

**Name**

**Address** (Address, City, State, Zip)

**Contact Name/Title**

**Email**

**Phone**

# 2025 Options Industry Conference Sponsorship Agreement

Each individual signing below represents that they have been authorized to execute this Agreement on behalf of their respective company, and that they have read, fully understand and agree to the terms and conditions of this Agreement.

**Sponsor**

**Signed** (Insert E-Signature or Print and Sign)

---

**Name**

**Title**

**Date**

**The Options Clearing Corporation**

**Signed** (Insert E-Signature or Print and Sign)

---

**Name**

**Title**

**Date**

# 2025 Options Industry Conference Sponsorship Agreement

## Exhibit A

### TERMS AND CONDITIONS

#### 1. TERM AND TERMINATION

The Agreement shall become binding and effective upon OCC signature and continue until June 7, 2025. OCC may terminate this Agreement at any time upon notice to Sponsor. Notwithstanding Section 4 below, if OCC terminates this Agreement, it shall refund any Sponsorship Fees paid by Sponsor. This refund is Sponsor's sole and exclusive right and remedy in the event of termination by OCC, and Sponsor shall not be entitled to any other payment or claim for damages, whether incidental, direct, consequential, special or otherwise in the event of termination by OCC.

#### 2. FEES

OCC will invoice Sponsor for payment of fees due under this Agreement ("Sponsorship Fees"), which shall be paid within thirty (30) days of receipt of invoice. Unless otherwise explicitly stated herein, all Sponsorship Fees paid are non-refundable.

#### 3. CONFERENCE CHANGES

OCC may, in its reasonable discretion, change Conference dates and times, and may cancel any portion of the Conference. OCC shall make reasonable efforts to accommodate Sponsor if sponsorship is materially diminished or modified as a result of such changes, but OCC is not obligated to refund any paid Sponsorship Fees. OCC shall inform Sponsor of any such changes promptly and in writing.

#### 4. FORCE MAJEURE

OCC shall not be responsible for any failure to perform under the terms of this Agreement due to reasons beyond its reasonable control, including without limitation, acts of God, the occurrence of an outbreak, epidemic, or pandemic as each of those terms is defined by the U.S. Centers for Disease Control, government authority, acts of terrorism, disaster, strikes, labor disputes and or civil disorders; any one of which makes performance illegal or impossible. If, because of a force majeure event, the Conference or any part thereof is prevented from being held, is canceled by OCC or the space becomes unavailable, OCC, in its sole discretion, shall determine and refund to the Sponsor its proportionate share of the balance of the aggregate Sponsorship Fees received which remains after deducting expenses incurred by OCC plus reasonable compensation to OCC. In no case shall the amount of the refund to the Sponsor exceed the amount of the Sponsorship Fees paid by Sponsor.

#### 5. ATTENDEES LIST

OCC may provide Sponsor with a list of Conference attendees. All such information shall be subject to [OCC's Privacy Statement](#). Sponsor shall not use the list for any other purpose but to promote the Conference. Sponsor shall remove attendees from any communication promptly following attendee communication to be removed from any contact list. All Sponsor communication with Conference attendees shall be in compliance with applicable law.

#### 6. NO ASSIGNMENT

The rights hereunder are exclusive to Sponsor. Sponsor may not assign its rights or obligations hereunder to a third party without the prior written consent of OCC.

#### 7. LIMITATION OF LIABILITY AND INDEMNIFICATION

EXCEPT FOR A PARTY'S ACTS OF GROSS NEGLIGENCE OR WILLFUL MISCONDUCT, NEITHER PARTY NOR ITS SUCCESSORS, ASSIGNS, OFFICERS, DIRECTORS, EMPLOYEES, CONTRACTORS, CONSULTANTS, REPRESENTATIVES AND AGENTS SHALL BE LIABLE TO THE OTHER PARTY OR ANY THIRD PARTY FOR ANY FOR ANY INDIRECT, INCIDENTAL, SPECIAL, OR CONSEQUENTIAL DAMAGES ARISING OUT OF THIS AGREEMENT. OCC'S AGGREGATE LIABILITY SHALL BE LIMITED TO SPONSORSHIP FEES PAID, AND ONLY TO THE EXTENT DAMAGES ARE A DIRECT RESULT OF OCC'S GROSS NEGLIGENCE OR WILLFUL MISCONDUCT.

Each Party agrees to indemnify, defend, and hold harmless the other Party (and its successors, assigns, officers, directors, employees, contractors, consultants, representatives and agents) from and against any and all third party losses, damages, injuries, causes of action, claims, penalties, interest, additional taxes, demands and expenses, including reasonable legal fees and expenses (collectively, "Losses"), arising out of:

- any material breach of this Agreement;
- any violation of any law, rule, regulation, or terms and conditions of Conference venue; or
- infringement of the intellectual property rights of any third party in connection with this Agreement.

Notwithstanding any other provision herein, OCC's indemnification obligations shall not exceed the Sponsorship Fees paid.

# 2025 Options Industry Conference Sponsorship Agreement

## 8. INSURANCE

Each Party shall obtain and maintain liability insurance providing coverage against injuries to the person and property of others, with minimum limits that are commercially reasonable for the type of business and activities engaged in by that Party and agrees to furnish evidence of such insurance upon request. Sponsor hereby waives all rights of subrogation against OCC and the owner and manager of the Conference venue. All property of Sponsor shall remain under Sponsor's custody and control, in transit to, within, or from the confines of the Conference.

## 9. SEVERABILITY

Invalidity, illegality or unenforceability of any provision of this Agreement does not affect any other provision. If a court finds a provision of this Agreement invalid, illegal or unenforceable, that provision shall be severed, and this Agreement shall remain in force in all other respects.

## 10. INTELLECTUAL PROPERTY

Sponsor grants to OCC a revocable, non-transferable, non-sub-licensable, non-exclusive, worldwide license to use the Sponsor name(s), logo(s) or other trademarks, data, materials or other intellectual property (the "Sponsor's Marks") provided by Sponsor to OCC solely for the purposes of the Conference, in accordance with Sponsor's trademark usage guidelines as provided by Sponsor, and such other purposes expressly made known by Sponsor. Sponsor shall have the right to inspect the use of Sponsor's Marks prior to the release of OCC Conference materials.

To the extent Sponsor's attendance at the Conference requires Sponsor to access and use any OCC intellectual property as approved by OCC, OCC grants to Sponsor a revocable, non-transferable, non-sub-licensable, non-exclusive license to use the OCC's intellectual property solely for the purposes of the Conference, in accordance with this Agreement and the OCC Trademark Usage Guidelines which shall be provided to Sponsor.

Each Party acknowledges and agrees that: (a) it shall not use any intellectual property of the other Party other than as permitted by, and in accordance with, this Agreement; and (b) it shall not acquire any rights in respect of any intellectual property of the other Party.

## 11. USE OF PHOTOGRAPHS

Sponsor agrees that OCC and its agents and subcontractors may use the name, image, likeness and voice in audio and video recordings and photographs of Sponsor or any of its employees, agents and representatives attending the Conference (the "Photographs") for marketing and promotional purposes related to the Conference. Sponsor represents that only those of its employees, agents and representatives who have consented to let OCC and use the Photographs shall be allowed by Sponsor to attend the Conference.

## 12. NO WAIVER

The failure of any Party at any time to require performance by the other Party of any provision of this Agreement shall in no way affect the right to require such performance at any time thereafter, nor shall the waiver of any Party of a breach of any provision of this Agreement constitute a waiver of any succeeding breach of the same or any other provision.

## 13. COMPLIANCE WITH LAWS

Each Party shall abide by and comply with all applicable laws, rules and regulations, ordinances, and all rules of the facility at which the Conference occurs.

## 14. GOVERNING LAW

The Agreement shall be interpreted in accordance with, and governed by, the laws of the State of Illinois, without reference to its choice of law rules. Any actions or proceedings by a Party against the other Party in connection with this Agreement may only be brought in the State of Illinois. Each Party waives any objection based on lack of personal jurisdiction, place of residence, improper venue or *forum non conveniens* in any such action.

