Hello [Supervisor’s name],

I would like your approval to attend Synergy 2020, Shareworks by Morgan Stanley’s annual client conference, which takes place May 26 - 29, 2020 in Austin, Texas.

This year’s conference would offer me the opportunity to experience the full potential of the Shareworks platform and help our company get value from its investment. I believe the practical skills and industry insight I will gain will help me be more effective and efficient in my use of the platform.

Synergy offers a wide range of sessions presented by industry speakers and Shareworks professionals.

**Here are some of the ways I will benefit from attending Synergy 2020:**

[Add / remove from this list so it’s most applicable to you.]

* **Dive deeper into Shareworks** – Breakout sessions are available throughout the conference that will help me make the most of specific Shareworks features I use each day.
* **Experience hands-on training –** Hands-on workshop training sessions focused on ad hoc reporting and other critical areas that will help optimize our investment in Shareworks.
* **Make connections** – More than 300 Shareworks clients are expected to share their experiences and best practices and learn from each other.
* **Explore the Shareworks Product Roadmap** – The Head of Shareworks by Morgan Stanley, Marcos Lopez, will share information about latest developments and upcoming enhancements to Shareworks so we can plan in advance for future functionality.
* **Provide feedback** – I can give the product team feedback on changes that would enhance our Shareworks experience.
* **Receive support** – During one-on-one consultation sessions in the Learning Lab, I can get help with our specific questions.
* **Gain insight** – I’ll hear from those in the industry as they discuss the latest trends in stock plan administration in key areas such as global regulatory requirements, financial reporting and participant communication. Synergy offers a unique opportunity to speak to them one-on-one.
* **Earn** **professional development credits** – Certain Synergy conference sessions may qualify me for CPE and/or CEP credits.

My Synergy agenda can be customized to fit the focus of my work in [tax, legal, finance, HR] at a [U.S., Canadian, global] [private, public] company such as ours. I can also choose sessions that are appropriate to my level of experience with the Shareworks platform, which I believe would be valuable to our organization.

**Breakdown of conference costs (approximate):**

|  |  |
| --- | --- |
| Airfare | $ [XXX] |
| Transportation (airport to hotel) | $70 USD (taxi – round trip) |
| Hotel (3 nights at $269 USD) | $747 USD (plus taxes) |
| Meals | $0 (all meals included in registration) |
| Registration fee | $ 1,499 \*current pricing  |
| Total | $ [XXXX] |

I believe this conference offers tremendous value and will be a great benefit to my work and the company this year. You can learn more about the conference [here](http://www.shareworks.com/synergy).

Thank you for considering my request and please let me know if you have any questions.

Sincerely,

[Your name]

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