



## Sponsorship Opportunities

### Collaborate with the Santa Clara Estate Planning Council

*Established in 1952, the SCCEPC is a networking and continuing education organization located in the heart of Silicon Valley for professionals involved in estate planning. By partnering with the SCCEPC, your organization will gain exposure to our experienced specialists, including attorneys, accountants, trust officers, private fiduciaries, financial planners, and life underwriters.*

#### **Meeting Sponsorship**      **\*Dinner (\$800)**      **\*Virtual (\$500)**      **\*Add a Meeting (\$400)\*** *equal or lesser value*

- Exposure to more than 120 leading estate planning professionals
- Featured 5 minute "Sponsor Introduction" prior to speaker presentation
- Reserved space for marketing and promotional materials at event/s (*dinner only*)
- Logo featured on sponsored meeting email and website promotions
- Complimentary passes for up to two attendees at sponsored meeting
- Access to attend one year of meetings at the member fee rate

#### **Branding Sponsorship**      **\*Annual (\$750)**      **\* Add On (\$300)\*** *must be purchased with meeting sponsorship*

- Sponsor logo featured on the SCCEPC website homepage for one-year with link to company website or information video
- Listing in the SCCEPC online website services directory for one-year including sponsor logo, detailed description with contact information and video
- Sponsor information and video in the 'community tab' of the SCCEPC YouTube channel
- Recognized as an annual sponsor during the open remarks of each SCCEPC meeting for one-year
- Sponsor logo featured on each pre-meeting slideshow for one-year
- Access to attend one year of meetings at the member fee rate
- Reserved space for marketing and promotional materials at all events for one-year (*dinner only*)

### 2020 - 2021 SCCEPC Meeting Information & Schedule

For the foreseeable future, we will offer programs via webinar at 3:30 PM. When we can return to in-person gatherings, we will meet at Fiorillo's Restaurant with a cocktail reception at 5:30 PM followed by dinner and program. *\*Dates, topics, and speakers subject to change*

- **Tuesday, September 22, 2020** – A View from the Bench Webinar presented by Judge Julie Emede, Santa Clara County, Superior Court, Probate Division
- **Tuesday, October 27, 2020** – Taxation of Partnerships Webinar presented by Steven L. Walker, Esq., Tax Attorney & Adjunct Professor, USF Law School & Panel
- **Thursday, November 12, 2020** – Virtual Wine Tasting & Family Business Q&A presented by Guglielmo Winery and Peter Johnson
- **Tuesday, December 1, 2020** - Impact Investing Webinar presented by Justina Lai, Chief Impact Officer with Wetherby Asset Management
- **Tuesday, January 26, 2021** – LGBT Issues in Estate Planning presented by Susan von Herrmann & Jody Bryson with Perkins Coie LLP
- **Tuesday, February 23, 2021** – Program presented by Todd Wohl, ASA, BRE with Braun – Premiere Estate Auction Company
- **Tuesday, March 23, 2021** – Program and Presenter TBD
- **Tuesday, April 27, 2021** – Ethics presented by Patrick Kohlmann & Russel Marshall
- **Monday, May 18, 2020** – Annual Meeting and Legal Update – Presenter TBD

**Interested in sponsorship?**

Please complete the following information and email to Stacie Sarasio at [stacie@non-profitservices.com](mailto:stacie@non-profitservices.com) or mail to SCCEPC | PO Box 641461 | Omaha, NE 68164

**SPONSORSHIP SUBJECT TO BOARD APPROVAL**

**Select Sponsorship Level**

- Meeting Sponsorship     Dinner (\$800)     Virtual (\$500)     Add a Meeting (\$400)
- Branding Sponsorship     Annual (\$750)     Add On (\$300)\**must be purchased with meeting sponsorship*

**Organization Contact Information**

Organization Name: \_\_\_\_\_

Website: \_\_\_\_\_

Representative Name: \_\_\_\_\_

Local Mailing Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

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

Phone Number: \_\_\_\_\_

**About your Organization**

How long has your organization been in business? \_\_\_\_\_

How does your organization relate to estate planning? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Is your organization regulated? If yes, by what regulatory body? \_\_\_\_\_

**2020 - 21 Meeting Schedule**

Please indicate which date(s) you would like to be featured.  
*SCCEPC will allow up to three non-competing sponsors per meeting.*

- September 22, 2020
- October 27, 2020
- November 12, 2020
- December 1, 2020
- January 26, 2021
- February 23, 2021
- March 23, 2021
- April 2, 2021
- May 25, 2021