



Santa Clara County
Estate Planning Council

www.sccepc.org

2025-2026 SPONSORSHIP PACKAGES

ABOUT US

The Santa Clara County Estate Planning Council is a networking and continuing education organization that brings together professionals involved in estate planning, including **attorneys, accountants, trust officers, private fiduciaries, financial planners and life insurance underwriters**. The Council fosters collaboration by promoting knowledge-sharing and providing forums for professional exchange across these disciplines.

DETAILS



Meetings are held at the
Delta Hotels by Marriott
2151 Laurelwood Rd, Santa Clara, CA
95054



Live stream/virtual
attendance also offered.

AFFILIATION



2025-2026 SEASON PROGRAM

All meetings are scheduled as Dinner meetings. Networking begins at 5:30pm, Dinner at 6:15pm, and CE Presentation at 7pm. Meeting dates, topics, speakers, and format are subject to change.

MONDAY, SEPTEMBER 15, 2025

A View From the Bench

MONDAY, OCTOBER 27, 2025

Tales From a Third Party Fiduciary

MONDAY, NOVEMBER 17, 2025

Matrimony, Money & Mayhem: What Every
Estate Planner Should Know About Divorce

MONDAY, DECEMBER 8, 2025

Annual Legal Update

DECEMBER 2025 DATE TBD

Virtual Event

MONDAY, JANUARY 26, 2026

Estate Planning for Financially Dependent
Loved Ones

MONDAY, FEBRUARY 23, 2026

Heckerling Highlights

MONDAY, MARCH 16, 2026

International Estate Planning Updates

MONDAY, APRIL 20, 2026

Community Foundations: Your Secret Superpower

MONDAY, MAY 18, 2026

Annual Tax Update



c/o Rocket Leadership Services
PO Box 141, Boystown, NE 68010



Phone : 402-301-4639
Email : Danielle@SCCEPC.org

OUR SPONSORSHIP LEVELS

All annual items are provided for the period of one calendar year from the commitment date.

ANNUAL BRANDING + SINGLE MEETING \$1,500

\$400 EACH ADDITIONAL MEETING



Includes all **Single Meeting and Annual Branding benefits** listed below, plus...

- Upgraded **complimentary premier level membership** allowing one individual to attend all meetings at no charge (\$490 value).
- **Logo placement** in each SCCEPC event photo gallery.
- Placement of **sponsor materials** at attendee seats.
- **Sponsor recognition** on virtual meeting platform.
- Annual branding email will **include past and prospective members**.

SINGLE MEETING \$850

\$400 EACH ADDITIONAL MEETING



- Exposure to a **captive audience of leading estate planning professionals** (attorneys, CPAs, fiduciaries, trust officers, financial planners, insurance professionals).
- Featured **5-minute sponsor presentation** pre-meeting.
- **Reserved space** for marketing and promotional materials at the sponsored meeting.
- **Logo featured** on sponsored meeting emails and website listing.
- **Complimentary passes** for up to two individuals to attend the sponsored meeting (a \$140 value).
- **One post-meeting email** sent to registered meeting attendees.
- **Verbal recognition** in the opening remarks at the sponsored meeting.

ANNUAL BRANDING \$750



- **Logo placement** with link on the SCCEPC homepage.
- **Listing in the online services directory**, including sponsor logo, company description, and contact info.
- **Recognition** as an Annual Sponsor during opening remarks for each meeting
- **Logo featured on pre-meeting slideshow** at all SCCEPC programs.
- **One dedicated email distribution** to SCCEPC membership.
- A **complimentary regular membership** for one individual to attend all meetings at the member rate (a \$240 value)



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COMMITMENT FORM



**COMPLETE THE FORM
AND RETURN TO:**



Danielle@SCCEPC.org



SCCEPC | PO Box 141 | Boystown, NE 68010

Payment by check is preferred. Please make checks payable to: SCCEPC
Credit card payment is available by contacting Danielle Kleber at 402-301-4639 or Danielle@SCCEPC.org.

SELECT SPONSORSHIP LEVEL – CHOOSE 1 OR 2

① ☐ Annual Branding + Single Meeting (\$1,500) - or - ☐ Single Meeting (\$850)

☐ Additional Meetings Qty ____ x \$400 = \$_____

Total Amount (add lines 1 and 2) \$

SELECT MEETING DATES

☐ September 15, 2025

☐ December 8, 2025

☐ March 16, 2026

☐ October 27, 2025

☐ January 26, 2026

☐ April 20, 2026

☐ November 17, 2025

☐ February 23, 2026

☐ May 18, 2026

② ☐ Annual Branding (\$750)

ALL SPONSORSHIPS ARE SUBJECT TO BOARD APPROVAL

SPONSOR INFO

Organization Name: _____

Website: _____

Representative Name: _____

Local Mailing Address: _____

City, State, Zip _____ Phone #: _____

Email Address: _____

How long has your organization been in business? _____

How does your organization relate to estate planning? _____

Is your organization regulated? If yes, what is the regulatory body? _____



EMAIL A HIGH-RESOLUTION LOGO TO: Danielle@SCCEPC.org



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