



Santa Clara County
Estate Planning Council

www.sccepc.org

2026-2027 SPONSORSHIP PACKAGES

ABOUT US

The Santa Clara County Estate Planning Council is a networking and continuing education organization for members of the various professions involved in estate planning, including attorneys, accountants, trust officers, private professional fiduciaries, and life underwriters. The council promotes knowledge and provides forums where cooperation among practitioners in these fields is supported through professional exchange.

AUDIENCE

- ✓ ATTORNEYS
- ✓ ACCOUNTANTS
- ✓ TRUST OFFICERS
- ✓ PRIVATE FIDUCIARIES
- ✓ FINANCIAL PLANNERS
- ✓ LIFE UNDERWRITERS

DETAILS



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



Increased meeting
attendance is made
possible via a virtual option
for all meetings.

AFFILIATION



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...
- A **complimentary ticket** for one individual to attend all meetings (\$720 value). *Does not include Triple Treat Mixer.*
 - **Logo placement** in each SCCEPC event photo gallery.
 - Placement of **sponsor materials** at tables at sponsored meeting.
 - **Sponsor recognition** on virtual meeting platform.
 - Email included with Annual Branding level will **include past and prospective members list.**

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** prior to CE speaker.
- **Reserved space** for marketing and promotional materials at the sponsored meeting.
- **Logo featured** on sponsored meeting emails and website listing.
- **Complimentary ticket** for up to two individuals to attend the sponsored meeting (\$180 value).
- **One post-meeting email** sent to meeting attendees.
- **Verbal recognition** in 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, contact info and video.
- **Recognition** as an Annual Sponsor during opening remarks for each meeting
- **Logo featured on meeting slideshow** at all SCCEPC programs.
- **One dedicated email distribution** to SCCEPC membership.

SEASON PROGRAM

2026

MONDAY, SEPTEMBER 28, 2026

A View From the Bench

MONDAY, OCTOBER 19, 2026

Beyond Stocks & Bonds

MONDAY, NOVEMBER 9, 2026

Impact of Elections on California Trust and Estate

Complimentary meeting ticket:

The complimentary meeting ticket includes meeting attendance, dinner, and continuing education credit.

All meetings for 2025-26 are scheduled for Dinner meetings.

Meeting dates, topics, speakers, and format are subject to change.

2027

MONDAY, JANUARY 25, 2027

Annual Legal Update

MONDAY, FEBRUARY 22, 2027

Heckerling Highlights

MONDAY, MARCH 15, 2027

From SEC to the Probate Court: Targeting Financial Elder Abuse and Securities Fraud

MONDAY, APRIL 19, 2027

California Property Tax Planning

MONDAY, MAY 17, 2027

Artificial Intelligence



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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 28, 2026

☐ January 25, 2027

☐ April 19, 2027

☐ October 19, 2026

☐ February 22, 2027

☐ May 17, 2027

☐ November 9, 2026

☐ March 15, 2027

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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