



## 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.

#### Dinner Meeting Sponsorship      \* One Event (\$850)      \* Two Events (\$1,200)

- 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
- Logo featured on sponsored meeting email and website promotions
- Complimentary dinner 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
- Listing in the SCCEPC online website services directory including sponsor logo and detailed description with contact information for one-year
- 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

### 2019 - 2020 SCCEPC Meeting Information & Schedule

All SCCEPC events are dinner meetings are held from 5:30 pm to 8:00 pm beginning with a cocktail reception and networking, followed by dinner and professional development program.

- **Monday, September 23, 2019** – A View from the Bench presented by Judge Julie Emede, Santa Clara County, Superior Court, Probate Division
- **Monday, October 21, 2019** – Peering Past 2019 with 2020 Visions - Market Update presented by Ken Fisher, Chairman, Fisher Investments
- **Monday, November 18, 2019** – International Tax Update presented by Steven L. Walker, Esq., Tax Attorney & Adjunct Professor, USF Law School
- **Monday, January 13, 2020** – Retirement Enhancement and Savings Act of 2019 presented by Michael C. Gray, CPA
- **Monday, February 24, 2020** – Valuation Discounts: Where We've Been, Where We're Going presented by Jim Brown, ASA, CFP® & Expert Panel
- **Monday, March 23, 2020** – New Horizons in Estate Planning presented by Steve Parrish, JD, RICP®, ChFC®, CLU®, RHU®, AEP® & Adjunct Professor, The American College & Drake Univ Law School
- **Monday, April 20, 2020** – Program and Presenter TBD
- **Monday, May 18, 2020** – Annual Meeting and Legal Update – Presenter TBD

*\*Dates, topics and speakers subject to change*

**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**

- Dinner Meeting Sponsorship       One Event (\$850)       Two Events (\$1,200)
- 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? \_\_\_\_\_

**2019 - 20 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 23, 2019
- October 21, 2019
- November 18, 2018
- January 13, 2020
- February 24, 2020
- March 23, 2020
- April 20, 2020
- May 18, 2020