



## 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)      \*Add a Meeting (\$400)\*

- 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

### 2021 - 2022 SCCEPC Meeting Information & Schedule

Meetings will be held at Fiorillo's Restaurant with a cocktail reception at 5:30 PM followed by dinner and program. *\*Dates, topics, speakers, and meeting format subject to change*

- **Tuesday, September 28, 2021** – A View from the Bench presented by Judge Julie Emede and Judge Lori Pegg, Santa Clara County, Superior Court
- **Tuesday, October 26, 2021** – Investor & Advisor Survey Insights: what you need to know (with some magic too) presented by Theron Schaub, Illusionist & VP, Strategic Relations, Loring Ward
- **Tuesday, November 30, 2021** – Advance Planning Review presented by Melissa Karlsten & Chelsea Suttman
- **Tuesday, January 25, 2022** – 706 Audit presented by Kyle C. Martin
- **Tuesday, February 22, 2022** – Tax Reform presented by Professor Anette Nellen, CPA, CGMA, Esq.
- **Tuesday, March 22, 2022** – Charitable Remainder Trusts as a Planning Tool for Stretch IRAs presented by Frank R. Acuna
- **Tuesday, April 26, 2022** – Program & Speaker TBA
- **Tuesday, May 24, 2022** – Annual Meeting and Legal Update presented by Jennifer F. Scharre & Erin A. Norcia

### Questions?

Contact Stacie Sarasio at [stacie@non-profitservices.com](mailto:stacie@non-profitservices.com) or 402.210.9446

**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)     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? \_\_\_\_\_

**2021 - 22 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 28, 2021                       October 26, 2021                       November 30, 2021
- January 25, 2022                       February 22, 2022                       March 22, 2022
- April 26, 2022                       May 24, 2022