



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 100 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 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

2022 - 2023 SCCEPC Meeting Information & Schedule

Meetings will be held at Delta Hotels Santa Clara Silicon Valley with a cocktail reception at 5:30 PM followed by dinner and program. **Dates, topics, speakers, and meeting format subject to change*

- **September 19, 2022** – A View from the Bench by Judge Lori Pegg
- **October 17, 2022 (w/ FSP)** – Medi-Cal Planning & Recovery by Peter Stern, JD
- **November 14, 2022** – Nervous TICs: The New Uniform Partition of Heirs Act by Jennifer Cunneen, Esq.
- **January 23, 2023 (LUNCH)** – Scariest than Lions & Tigers & Bears: The Income Taxation of Trusts, Oh My! by Justin Miller, Esq.
- **February 27, 2023 (w/ FSP & FPA)** – Social Security Program by Douglas A. Ewing, JD, CFP, RICP
- **March 20, 2023** – International Estate Planning by Richard S. Kinyon & EJ Hong
- **April 24, 2023** – Tax Update w/ a Secure Act Review, version 2022 by Michael Gray, CPA
- **May 22, 2023** – Annual Legal Update by Jennifer Scharre and Erin Norcia

Questions?

Contact Stacie Sarasio at stacie@SCCEPC.org or 402.210.9446

Interested in sponsorship?

Please complete the following information and email to Stacie Sarasio at Stacie@SCCEPC.org 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? _____

2022 - 23 Meeting Schedule

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

- | | | |
|---|--|--|
| <input type="checkbox"/> September 19, 2022 | <input type="checkbox"/> October 17, 2022 | <input type="checkbox"/> November 14, 2022 |
| <input type="checkbox"/> January 23, 2023 | <input type="checkbox"/> February 27, 2023 | <input type="checkbox"/> March 20, 2023 |
| <input type="checkbox"/> April 24, 2023 | <input type="checkbox"/> May 22, 2023 | |