



## 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 captive audience of leading estate planning professionals at featured meeting
- Featured 5 minute “Sponsor Presentation” at featured meeting
- 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
- 1 post meeting e-mail distribution to membership

#### 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
- 1 email distribution to membership

### **2023 - 2024 SCCEPC Meeting Information & Schedule**

Meetings will be held at Delta Hotels Santa Clara Silicon Valley. Dinner - 5:30 PM, Lunch – 11:30 AM, Happy Hour – 4:30 PM. *\*Dates, topics, speakers, and meeting format subject to change*

- **September 18, 2023 (DINNER)** – A View from the Bench
- **October 23, 2023 (LUNCH)** – Special Needs Planning: It Takes a Village
- **December 4, 2023 (DINNER)** – Expert Panel - Kohlmann, Prokey and Braccini – A Year in Review
- **January 22, 2024 (LUNCH)** – Recent Developments in Estate & Gift Tax – Kyle Martin
- **February 26, 2024 (DINNER)** – Divorce in Estate Planning
- **March 25, 2024 (HAPPY HOUR)** – TBD
- **April 22, 2024 (DINNER)** – Annual Tax Update w/ Michael Gray, CPA
- **May 20, 2024 (DINNER)** – TBD

#### Questions?

Contact Stacie Sarasio at [stacie@SCCEPC.org](mailto:stacie@SCCEPC.org)

#### Interested in sponsorship?

Please complete the following information and email to [Stacie@SCCEPC.org](mailto: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? \_\_\_\_\_

**2023 - 24 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 18, 2023 | <input type="checkbox"/> October 23, 2023  | <input type="checkbox"/> December 4, 2023 |
| <input type="checkbox"/> January 22, 2024   | <input type="checkbox"/> February 26, 2024 | <input type="checkbox"/> March 25, 2024   |
| <input type="checkbox"/> April 22, 2024     | <input type="checkbox"/> May 20, 2024      |   |