



# 2025-2026 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](mailto: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...

- Upgraded **complimentary premier level membership** allowing one individual to attend all meetings at no charge (\$490 value).
- **Logo placement** in each SCCEPC event photo gallery.
- Placement of **sponsor materials** at seats at sponsored meeting.
- **Sponsor recognition** on virtual meeting platform.
- Branding email will **include past and prospective members**.

## 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** during the meeting.
- **Reserved space** for marketing and promotional materials at the sponsored meeting.
- **Logo featured** on sponsored meeting emails and website listing.
- **Complimentary passes** for up to two individuals to attend the sponsored meeting (\$140 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 pre-meeting slideshow** at all SCCEPC programs.
- **One dedicated email distribution** to SCCEPC membership.
- A **complimentary regular membership** for one individual to attend all meetings at the member rate (\$130 value).

## SEASON PROGRAM

### 2025

**MONDAY, SEPTEMBER 15, 2025**

A View From the Bench

**MONDAY, OCTOBER 27, 2025**

Tales From a Third Party Fiduciary

**MONDAY, NOVEMBER 17, 2025**

Matrimony, Money & Mayhem: What Every Estate Planner Should Know About Divorce

**MONDAY, DECEMBER 8, 2025**

Annual Legal Update

**DECEMBER 2025 DATE TBD**

Virtual Event

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

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

### 2026

**MONDAY, JANUARY 26, 2026**

Estate Planning for Financially Dependent Loved Ones

**MONDAY, FEBRUARY 23, 2026**

Heckerling Highlights

**MONDAY, MARCH 16, 2026**

International Estate Planning Updates

**MONDAY, APRIL 20, 2026**

Community Foundations: Your Secret Superpower

**MONDAY, MAY 18, 2026**

Annual Tax Update



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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 15, 2025

December 8, 2025

March 16, 2026

October 27, 2025

January 26, 2026

April 20, 2026

November 17, 2025

February 23, 2026

May 18, 2026

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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