

SACRAMENTO
ESTATE
PLANNING
COUNCIL

in conjunction with

UNIVERSITY OF THE
PACIFIC
McGeorge School of Law

2012 Technical Forum

Thursday, January 26, 2012

7:45 a.m. – 6:00 p.m

2012 Presenters



Howard M. Zaritsky

Howard M. Zaritsky, J.D., LL.M.,

Practical Estate Planning in 2012
and Select Tax-Saving Techniques



Steve Oshins

Oshins & Associates, LLC

Asset Protection other than
Self-Settled Trusts



Benjamin A. Koplan

Ash Brokerage Group

Obligations of the Trusted Advisor:
Addressing Risk in Today's World



Robert P. Schweih

Willamette Management Assoc.

Valuation Adjustments for Estate
and Gift Tax Purposes

About the Forum

The Sacramento Estate Planning Council's Technical Forum is the premier Northern California educational conference for professionals in the estate planning field. The one day conference features nationally known experts from across the country, speaking on issues and concepts that are essential for practitioners who wish to stay up to date. The Tech Forum, now in its forty-first year, is the ideal place to earn continuing education credit in law, accounting, financial planning, and insurance. It is also one of the few local venues offering legal specialization credit from the California State Bar in the areas of tax and estate planning law.

The 2012 Tech Forum is the most diverse in recent memory. With experts speaking on Practical Estate Planning Methods, Estate Tax, Asset Protection, Valuation, Fiduciary Issues and Financial Concerns, this year's forum offers something for every practitioner.

For information on sponsorship opportunities for the 2012 Technical Forum contact
Raquel Altavilla, 916.715.5939 or raltavilla@comcast.net.



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Sponsorship Overview

The Sacramento Estate Planning Council Technical Forum offers prime opportunities for product and service providers to efficiently target-market advertise, as well as meet face-to-face with estate planning practitioners throughout Northern California.

As one of Northern California's premier professional organizations, the *Sacramento Estate Planning Council (SEPC)* provides a forum where diverse professionals share information about the constantly changing field of estate planning. The Council's sterling reputation attracts more than 150 high-level estate planning professionals to its Technical Forum yearly. If you market to attorneys, accountants, financial planners, investment and insurance professionals, valuation experts or professional fiduciaries, sponsorship of the SEPC Technical Forum should be considered a critical component of your marketing mix.

Opportunities are structured to provide access to decision-making attendees in a variety of settings and with various levels of branding and degrees of exposure. Sponsorship opportunities include:

Networking Focus:

- Personally interact face-to-face with decision makers in the estate planning profession
- Gain access to your target market in an informal setting
- Grant potential clients/customers access to your senior executives as well as product specialists

Marketing Deliverables:

- Recognition in the Forum promotional brochures, sent to estate planning professionals in Northern California
- Maximize your product/service exposure through a complimentary hyperlink from the SEPC website to your home page or a landing page
- Participate in promotional email broadcasts to SEPC members and potential attendees

On-Site Deliverables:

- Recognition and ad space in the Forum event workbook, which is provided to every attendee
- Opportunity to display corporate literature/marketing materials at designated areas
- Banners and signs recognizing your company as a sponsor and supporter of the event
- Complimentary passes to attend the forum—valued at \$285 each

What is the SEPC Technical Forum?

The 2012 SEPC Technical Forum will be held on *January 26, 2012* at University of the Pacific, McGeorge School of Law in Sacramento, California. This one-day educational program focuses on issues of importance to estate planning practitioners. Industry experts present their perspectives and findings in this dynamic and changing field.

What is the Audience Profile?

A unique offering in the greater Sacramento metropolitan area, the Technical Forum typically attracts estate planning professionals from the Northern California region. Forum attendees are primarily attorneys, accountants, investment and insurance professionals as well as professional fiduciaries.

2012 Technical Forum

Sponsorship Levels

Speaker sponsor - \$5,000 *(limited to two sponsors)*

- Speaker Introduction
- Premium placement of logo/links on Event Emails, Website, and Flyer
- Full-page (front or back cover) advertisement in Casebook*
- Trade show booth at event
- Splash page on all event monitors and presentation screen
- Scrolling sponsor recognition on monitors during breaks
- Premium solo and combined signage at event
- Sponsor marketing materials included in bag
- Four complimentary 2012 Tech Forum passes (\$1,140 value)
- Invitation to private speakers' dinner

Platinum sponsor - \$3,000 *(limited to three sponsors)*

- Premium placement of logo/links on Event Emails, Website, and Flyer
- Full-page premium-placement advertisement in Casebook*
- Trade show booth at event
- Splash page on all event monitors and presentation screen
- Scrolling sponsor recognition on monitors during breaks
- Premium solo and combined signage at event
- Sponsor marketing materials included in bag
- Two complimentary 2012 Tech Forum passes (\$570 value)
- Invitation to private speakers' dinner

Gold sponsor - \$2,000 *(limited to five sponsors)*

- Premium placement of logo/links on Event Emails, Website, and Flyer
- Half-page advertisement in Casebook*
- Trade show booth at event
- Scrolling sponsor recognition on monitors during breaks
- Solo and combined signage at event
- Sponsor marketing materials included in bags
- Two complimentary 2012 Tech Forum passes (\$570 value)
- Invitation to private speakers' dinner

Silver sponsor - \$1,000

- Premium placement of logo/links on Event Emails, Website, and Flyer
- Quarter-page advertisement in Casebook*
- Trade show booth at event
- Scrolling sponsor recognition on monitors during breaks
- Combined signage at event
- Sponsor marketing materials included in bags
- One complimentary 2012 Tech Forum pass (\$285 value)

Bronze sponsor - \$500

- Links to sponsor on Event Emails and Website
- Quarter-page advertisement in Casebook*
- Scrolling sponsor recognition on monitors during breaks
- Combined signage at event

* **Deadline to submit advertisement for placement in the SEPC Casebook is Tuesday, January 10, 2012.** Please submit your advertisement as a hi-res (300 dpi or greater), black and white TIFF, JPEG or PDF file only.

Full page – 7 ½" x 10"

Half page – 7 ½" x 4 ¾"

Quarter page – 3 ½" x 4 ¾"