

2017 Technical Forum

Tuesday, January 31, 2017

7:45 a.m. – 6:00 p.m

2017 Presenters



M. Read Moore

McDermott Will & Emery

- *A New World Order for Estate Planners (or Why Is It So Difficult to Open a Bank Account)?*
- *The Devil is in the Details: Important Tax Administration and Procedural Rules for Estate Planners*
- *Frozen Brain: Estate Planning Strategies for QTIP Trust Assets*

Shane Nolan

Wells Fargo Investment Institute
Alternative Investments



John Prokey

Ramsbacher Prokey Leonard LLP
and

Mark Higgins

Higgins, Marcus & Lovett, Inc.

*Legal Aspects/Issues with
Valuations*



Matt Clausen

Adler & Colvin

*Charitable Gifts of Business
Interests*



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-sixth year, is the ideal place to earn continuing education credit in law, accounting and financial planning.

It is also one of the few local venues offering credit for not only general California Bar MCLE purposes, but for the California Bar legal specializations in (1) Taxation, and (2) Estate Planning, Trust and Probate law. All courses will be approved for continuing education for general MCLE purposes including the specializations. There will be 7 hours of credit available.

The 2017 Tech Forum continues the tradition of bringing a diversity of topics to offer something for every practitioner. Please join us and 150+ of your peers for the SEPC 2017 Technical Forum.

For information on sponsorship opportunities for the 2017 Technical Forum contact Raquel Altavilla, 916.715.5939 or raltavilla@comcast.net.

Location: McGeorge School of Law, 3200 5th Ave, Sacramento, CA 95817

SACRAMENTO
ESTATE
PLANNING
COUNCIL

in conjunction with

UNIVERSITY OF THE
PACIFIC
McGeorge School of Law

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Sponsorship Overview

The Sacramento Estate Planning Council Technical Forum presents a prime opportunity 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 dynamic and constantly changing field of estate planning. The Council's reputation for excellence 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 makers 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 2017 SEPC Technical Forum will be held on January 31, 2017 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.

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Sponsorship Levels

Emerald Level - \$10,000 (limited to one sponsor)

- Keynote Speaker introduction
- Premium Placement of logo/links on event e-mails, website, and flyer
- Full-page (front 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
- 4 passes to 2017 Tech Forum (\$1,140 value)
- Invitation to private speaker/sponsor dinner (4 people)
- Complete exclusivity as the highest sponsorship.

Diamond sponsor - \$5,000

- Speaker Introduction
- Premium placement of logo/links on Event Emails, Website, and Flyer
- Full-page (back cover or premium-placement) color 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 2017 Tech Forum passes (\$1,140 value)
- Invitation to private speaker/sponsor dinner

Platinum sponsor - \$3,000

- Premium placement of logo/links on Event Emails, Website, and Flyer
- Full-page premium-placement color 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 2017 Tech Forum passes (\$570 value)
- Invitation to private speaker/sponsor dinner

Gold sponsor - \$2,000

- Premium placement of logo/links on Event Emails, Website, and Flyer
- Half-page vertical, black and white advertisement in Casebook*
- Trade show booth at event, subject to availability
- Scrolling sponsor recognition on monitors during breaks
- Combined signage at event
- Sponsor marketing materials included in bags
- Two complimentary 2017 Tech Forum passes (\$570 value)
- Invitation to private speaker/sponsor dinner

Silver sponsor - \$1,000

- Premium placement of logo/links on Event Emails, Website, and Flyer
- Quarter-page vertical, black and white advertisement in Casebook*
- Trade show booth at event, subject to availability
- Scrolling sponsor recognition on monitors during breaks
- Combined signage at event
- Sponsor marketing materials included in bags
- One complimentary 2017 Tech Forum pass (\$285 value)

Bronze sponsor - \$500

- Links to sponsor on Event Emails and Website
- Quarter-page vertical, black and white 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 Friday, January 13, 2017.**

Please submit your advertisement as a hi-res (at least 150 dpi for black and white and 300 dpi for color), TIFF, JPEG, PSD, EPS or PDF file only.

Full page (color ad) 7 ½" W x 10" H

Half page (black/white ad) 7 ½" W x 4 ¾" H

Quarter page (black/white ad) 3 ½" W x 4 ¾" H