

# 2020 ESTATE PLANNING FORUM

McGEORGE SCHOOL OF LAW

FRIDAY, JANUARY 31, 2020 · 8:00 AM – 4:00 PM

WINE RECEPTION FOLLOWING FORUM

## ABOUT THE FORUM

The Sacramento Estate Planning Council's Estate Planning 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 Estate Planning Forum, now in its forty-ninth year, is the ideal place to earn continuing education credit in law, accounting and financial planning.

The Estate Planning Forum is one of the few local venues offering 6 hours of credit for general California Bar MCLE purposes and specializations in Taxation Law and Estate Planning, Trust and Probate Law. In addition to credit for MCLE, there will be 6 hours of CE available for CFPs, CPAs and CLPFs.

The 2020 Estate Planning 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 2020 Estate Planning Forum.

**ROBERT S. KEEBLER,**  
CPA/PFS, MST,  
AEP (DISTINGUISHED), CGMA  
Keebler & Associates, LLP



**JUSTIN T. MILLER,**  
J.D., LL.M., TEP, AEP®, CFP®  
National Wealth Strategist



**KEITH SCHILLER,**  
ESQUIRE  
Schiller Law Group



For more information and sponsorship opportunities for the 2020 Estate Planning Forum, contact Raquel Altavilla at 916-715-5939 or [raltavilla@comcast.net](mailto:raltavilla@comcast.net).

# 2020 ESTATE PLANNING FORUM

McGEORGE SCHOOL OF LAW . FRIDAY, JANUARY 31, 2020 . 8:00 AM – 4:00 PM

## SPONSORSHIPS

### SPONSORSHIP OVERVIEW

The Estate Planning 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 Estate Planning Forum yearly. If you market to attorneys, accountants, financial planners, investment and insurance professionals, valuation experts or professional fiduciaries, sponsorship of the Estate Planning 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 Estate Planning 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 Estate Planning 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 \$295 each

#### **What is the SEPC Estate Planning Forum?**

The Estate Planning Forum will be held on January 31, 2020 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 Estate Planning 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.

# 2020 ESTATE PLANNING FORUM

McGEORGE SCHOOL OF LAW . FRIDAY, JANUARY 31, 2020 . 8:00 AM – 4:00 PM

## SPONSORSHIP LEVELS

### DIAMOND SPONSOR – \$4,000

- Enhanced, in-kind marketing opportunities (such as logo placement on bags or lanyards; recognition as sponsor of breakfast, snacks, lunch or wine reception; speaker introductions; sponsor of raffle prizes at wine reception; casebook printing and/or thumb drive)
- 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 bags
- Four complimentary 2020 Estate Planning Forum passes (\$1,180 value)
- Invitation to private speakers' dinner (2 people)

### 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 combined signage at event
- Sponsor marketing materials included in bags
- Two complimentary 2020 Estate Planning Forum passes (\$590 value)
- Invitation to private speakers' dinner (2 people)

### 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 2020 Estate Planning Forum passes (\$590 value)
- Invitation to private speakers' dinner (1 person)

### 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 2020 Estate Planning Forum pass (\$295 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 Casebook is Monday, December 9, 2019.

Please submit your advertisement as a hi-res (at least 150 dpi for black & 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

For more information and sponsorship opportunities for the 2020 Estate Planning Forum, contact Raquel Altavilla at 916-715-5939 or [raltavilla@comcast.net](mailto:raltavilla@comcast.net).