



2021

ESTATE PLANNING FORUM

All-Virtual Forum

Friday, January 29, 2021 . 8:00 am – 1:30 pm

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

The 2021 Estate Planning Forum – which will be an *all-virtual 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 2021 Estate Planning Forum.

This year, the Estate Planning Forum will offer up to 4.25 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 up to 4.25 hours of CE available for CFPs, CPAs and CLPFs.

RONALD D. AUGUTT

Bessemer Trust



The Top Ten Estate Planning and Estate Tax Developments of 2020

GERRY W. BEYER

Texas Tech University School of Law



*Unusual Will Provisions and Enforcement Issues
Cyber Estate Planning and Administration*

AMY FLORIAN

Corgenius



*Advising Clients through the
Toughest Times of Life*

For more information and sponsorship opportunities for the 2021 Estate Planning Forum, contact Raquel Altavilla at 916-715-5939 or raltavilla@comcast.net.

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SPONSORSHIPS

Sponsorship Overview

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:

- Interact 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

Day-Of Deliverables:

- Recognition and ad space in the Estate Planning Forum event workbook, which is provided to every attendee
- Recognition of your company as a sponsor and supporter of the event
- Complimentary passes to attend the Forum—valued at \$100 each

What is the SEPC Estate Planning Forum?

The Estate Planning Forum will be held on January 29, 2021. The 2021 Forum will be an all-virtual forum, allowing participants and sponsors to access the same high-caliber content with the convenience of attending remotely. 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.

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Platinum Sponsor - \$3,000

- Enhanced, in-kind marketing opportunities (such as logo placement on website and virtual backgrounds; speaker introductions; sponsor raffles before breaks)
- Premium placement of logo/links on Event Emails, Website, and Flyer
- Full-page premium-placement color advertisement in Casebook*
- Premium sponsor recognition during breaks
- Four complimentary 2021 Estate Planning Forum passes (\$400 value)

Gold Sponsor - \$2,000

- Premium placement of logo/links on Event Emails, Website, and Flyer
- Full-page black and white advertisement in Casebook*
- Premium sponsor recognition during breaks
- Three complimentary 2021 Estate Planning Forum passes (\$300 value)

Silver Sponsor - \$1,000

- Premium placement of logo/links on Event Emails, Website, and Flyer
- Half-page horizontal, black and white advertisement in Casebook*
- Sponsor recognition during breaks
- One complimentary 2021 Estate Planning Forum pass (\$100 value)

Bronze Sponsor - \$500

- Links on Event Emails and Website
- Quarter-page vertical, black and white advertisement in Casebook*
- Sponsor recognition during breaks

* Deadline to submit advertisement for placement in the Casebook is Friday, January 15, 2021.

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 / black & white 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

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