

2023

Estate Planning Forum

Live and Virtual Forum

Friday, May 19, 2023 . 8:00 am – 4:30 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 – which will be a *live and virtual forum* – continues the tradition of bringing a diversity of topics to cover something for every practitioner. Please join us and 150+ of your peers for the 2023 Estate Planning Forum at McGeorge School of Law in Sacramento.

This year, the Estate Planning Forum will offer up to 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 up to 6 hours of CE available for CFPs, CPAs, CLPFs, and CTFAs.

ANDREW KATZENSTEIN
Proskauer Rose LLP



THOMAS J. PAULOSKI
Bernstein Private Wealth Mgmt.



Over-Rated? How Surging Interest Rates and Slow Growth May Radically Change Wealth Transfer Planning

PAUL S. LEE
Investment Offices Group
Northern Trust



Conquering Subchapter K(rpytonite): Fundamentals of Partnership Taxation for Estate Planners

BRYAN CLONTZ
Charitable
Solutions, LLC



Top 10 Charitable Trends Every Advisor Should Know in 2023

KAREN SUGIHARA
BNY Mellon Wealth
Management



Tales from the Darkside: What Corporate Fiduciaries Wish Advisors Would Consider and Discuss with Clients

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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 \$295 each

What is the SEPC Estate Planning Forum?

The Estate Planning Forum will be held on May 19, 2023. The 2023 Forum will be a live and 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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Diamond Sponsor - \$5,000

- 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 2023 Estate Planning Forum passes (value of passes up to \$295 each)
- Invitation to private speakers' dinner (2 people)

Platinum Sponsor - \$4,000

- 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
- Three complimentary 2023 Estate Planning Forum passes (value of passes up to \$295 each)
- Invitation to private speakers' dinner (2 people)
- Sponsor marketing materials included in bags
- Trade show booth at event

Gold Sponsor - \$2,000

- Premium placement of logo/links on Event Emails, Website, and Flyer
- Half-page horizontal, black and white advertisement in Casebook*
- Premium sponsor recognition during breaks
- Two complimentary 2022 Estate Planning Forum passes (value of passes up to \$295 each)
- Invitation to private speakers' dinner (1 person)
- Sponsor marketing materials included in bags
- Trade Show booth at event, subject to availability

Silver Sponsor - \$1,000

- Premium placement of logo/links on Event Emails, Website, and Flyer
- Quarter-page vertical, black and white advertisement in Casebook*
- Sponsor recognition during breaks
- One complimentary 2023 Estate Planning Forum pass (value of pass up to \$295 each)
- Sponsor marketing materials included in bags
- Trade Show booth at event, subject to availability

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 Monday, May 1, 2023.**

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 2023 Estate Planning Forum, contact Raquel Altavilla at 916-715-5939 or admin@sacepc.org.