



Santa Clara County
Estate Planning Council

www.sccepc.org

Affiliated with:



www.naepc.org

Sponsorship Opportunities

Collaborate with the Santa Clara Estate Planning Council

Established in 1952, the SCCEPC is a networking and continuing education organization located in the heart of Silicon Valley for professionals involved in estate planning. By partnering with the SCCEPC, your organization will gain exposure to our experienced specialists, including attorneys, accountants, trust officers, private fiduciaries, financial planners, and life underwriters.

Meeting Sponsorship *Dinner (\$800) *Add a Meeting (\$400)*

- Exposure to captive audience of leading estate planning professionals at featured meeting
- Featured 5 minute “Sponsor Presentation” at featured meeting
- Reserved space for marketing and promotional materials at event/s
- Logo featured on sponsored meeting email and website promotions
- Complimentary passes for up to two attendees at sponsored meeting
- Access to attend one year of meetings at the member fee rate
- 1 post meeting e-mail distribution to membership

Branding Sponsorship *Annual (\$750) * Add On (\$300)* *must be purchased with meeting sponsorship*

- Sponsor logo featured on the SCCEPC website homepage for one-year with link to company website or information video
- Listing in the SCCEPC online website services directory for one-year including sponsor logo, detailed description with contact information and video
- Sponsor information and video in the ‘community tab’ of the SCCEPC YouTube channel
- Recognized as an annual sponsor during the open remarks of each SCCEPC meeting for one-year
- Sponsor logo featured on each pre-meeting slideshow for one-year
- Access to attend one year of meetings at the member fee rate
- Reserved space for marketing and promotional materials at all events for one-year
- 1 email distribution to membership

2024 - 2025 SCCEPC Meeting Information & Schedule

Meetings will be held at Delta Hotels Santa Clara Silicon Valley. Dinner - 5:30 PM, Lunch – 11:30 AM, Happy Hour – 4:30 PM. **Dates, topics, speakers, and meeting format subject to change*

- **September 16, 2024 (DINNER)** – A View from the Bench
- **October 28, 2024 (DINNER)** – Charitable/Planned Giving – speaker TBD
- **December 9, 2024 (DINNER)** – Legal update – speaker TBD
- **January 13, 2025 (DINNER)** – Artificial Intelligence – Christopher George, JD
- **February 10, 2025 (DINNER)** – Sunset Provisions of TCJA – Justin Miller, JD (date may change)
- **March 18, 2025 (TBD)** – TBD
- **April 23, 2025 (TBD)** – TBD
- **May 19, 2025 (TBD)** – TBD

Questions?

Contact Danielle Kleber at danielle@SCCEPC.org

Interested in sponsorship?

Please complete the following information and email to Danielle@SCCEPC.org

or mail to SCCEPC | PO Box 141 | Boystown, NE 68010
SPONSORSHIP SUBJECT TO BOARD APPROVAL

Select Sponsorship Level

- Meeting Sponsorship Dinner (\$800) Add a Meeting (\$400)
Branding Sponsorship Annual (\$750) Add On (\$300)**must be purchased with meeting sponsorship*

Email logo to: danielle@SCCEPC.org

Organization Contact Information

Organization Name: _____

Website: _____

Representative Name: _____

Local Mailing Address: _____

City, State, Zip: _____

Email Address: _____

Phone Number: _____

About your Organization

How long has your organization been in business? _____

How does your organization relate to estate planning? _____

Is your organization regulated? If yes, by what regulatory body? _____

2024 - 25 Meeting Schedule

Please indicate which date(s) you would like to be featured.
SCCEPC will allow up to three non-competing sponsors per meeting.

- | | | |
|---|--|---|
| <input type="checkbox"/> September 16, 2024 | <input type="checkbox"/> October 28, 2024 | <input type="checkbox"/> December 9, 2024 |
| <input type="checkbox"/> January 13, 2025 | <input type="checkbox"/> February 10, 2025 | <input type="checkbox"/> March 18, 2025 |
| <input type="checkbox"/> April 23, 2025 | <input type="checkbox"/> May 19, 2025 | |