



Central Arizona Estate Planning Council 2023-2024 Season

Sponsor Commitment Form

*Preferred meeting
(choose two)*

Meeting Dates	Event Description and Sponsor Cost	1 st Choice	2 nd Choice
October 2, 2023	October Continuing Education Event – <i>Steven Trytten Esq., CPA, MBA, ACTEC Retirement Planning Post Secure 2.0</i>	<input type="checkbox"/> Reserved	<input type="checkbox"/> Reserved
November 6, 2023	November Continuing Education Event – <i>Eido Walny Celebrities, and what we can learn from their mistakes</i>	<input type="checkbox"/>	<input type="checkbox"/>
December 4, 2023	December Continuing Education Event- <i>Joint Event with CFA Phoenix</i>	<input type="checkbox"/> Reserved	<input type="checkbox"/> Reserved
January 8, 2024	Holiday Gathering – <i>National Championship Game Watch</i>	<input type="checkbox"/>	<input type="checkbox"/>
February 5, 2024 ½ Day Program	Half Day Program - 1st Half – <i>Jerry Hesch Preferred Partnership for Encumbered Real Estate</i>	<input type="checkbox"/>	<input type="checkbox"/>
February 5, 2024 ½ Day Program	Half Day Program – 2nd Half – <i>Jerry Hesch Freeze Partnership</i>	<input type="checkbox"/>	<input type="checkbox"/>
March 4, 2024	March Continuing Education Event – <i>Tentative: Amina Saeed Charitable Discussion</i>	<input type="checkbox"/> Reserved	<input type="checkbox"/> Reserved
May 2, 2024	Annual Spring Golf Tournament <i>Varied Sponsorships Available</i>	<input type="checkbox"/>	<input type="checkbox"/>
May 6, 2024	May Continuing Education Event – <i>Speaker and Topic TBD</i>	<input type="checkbox"/>	<input type="checkbox"/>
2023-2024 Season	Master Website Sponsor <i>A full year of front-page visibility!</i>	<input type="checkbox"/> Reserved	<input type="checkbox"/> Reserved
2023-2024 Season	Emerging Professionals' Group Scholarship <i>Three sponsorships available – two still available</i>	<input type="checkbox"/>	<input type="checkbox"/>
2023-2024 Season	Accredited Estate Planner (AEP) Event Sponsor	<input type="checkbox"/>	<input type="checkbox"/>
2023-2024 Season	Dinner Wine Sponsor (Recognition Every Dinner)	<input type="checkbox"/> Reserved	<input type="checkbox"/> Reserved
2023-2024 Season	Meeting Prize Sponsor (Recognition Every Dinner)	<input type="checkbox"/> Reserved	<input type="checkbox"/> Reserved
2023-2024 Season	Technology Sponsor (Recognition Every Dinner)	<input type="checkbox"/> Reserved	<input type="checkbox"/> Reserved



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Sponsor Commitment Form (p 2)

- This sponsorship commitment form is your key to securing your sponsorship.
- Please complete both pages and return by email. It will be date and time stamped.
- We honor all preferences as best as we can and settle competing requests by date and time stamp of receipt.
- Two months following the initial sponsorship offering, any open sponsorship positions will be advertised to all CAEPC members.

Thank you for your support of our Council!

1. Our **firm's name** for sponsorship recognition is (the name below will be used on all published materials):

2. Our **firm's contact/meeting representative is:** _____

Contact's phone number: _____

Contact's e-mail address: _____

3. Sponsorship Commitment Signed by: (contact's signature and title/authority to contract)

Signature

Title

4. Our expected sponsorship fee for our meeting choice is: \$ _____

5. Please include a weblink posting on the CAEPC website for our organization.

Our website address is: _____

6. Payment Information (payment is due for pre-committed sponsors of the 2022-2023 season after June 1, 2022, but at the latest, 30 days prior to the committed event date). *Check is preferred.* Please select one of the following:

- We will mail a check.
- Please invoice us.

7. I acknowledge by signing this Sponsorship Commitment Form that CAEPC is authorized to publish our logo in all materials relating to our sponsorship of CAEPC and its events, as is determined by the CAEPC board and sponsorship committee. Questions may be directed to the sponsorship chair through info@caepec.org

8. Attached, via email, is our press quality logo (format preferred .tif or .jpg, 300 dpi or higher quality, file size not to exceed 1MB) info@caepec.org

9. Anticipated visibility for 2022-2023 season only, described on following page.

10. If an in-person event is cancelled due to COVID-19 restrictions, we will contact you regarding your options to roll over your sponsorship to the following season or receive a refund.

Note: As of June 30, 2022, this is our planned program for the season.
Please realize that all speakers/topics listed above are potentially subject to change
(illness, family obligations, last minute court dates or scheduling conflicts may arise) and scheduling issues may impact scheduled dates.

[Central Arizona Estate Planning Council](http://CentralArizonaEstatePlanningCouncil.org)
7375 E. 6th Avenue, Suite 9, Scottsdale, Arizona 85251
Phone: 602-456-0591 | E-mail: info@caepec.org



Central Arizona Estate Planning Council

2023-2024 Season

2023-2024 Season Sponsor Benefits Outline

Continuing Education Event Sponsor:

- Ability to bring 2 guests to the meeting you sponsor
- Ability to invite other staff to attend virtually via our Zoom presentation
- Ability to self-market on our social media sites
- Year-round logo and link on "Sponsors" website page and specific event page
- CAEPC signage "Thank you to XYZ sponsor" on rotating PowerPoint at beginning of presentation
- Opportunity to speak for a few minutes at the beginning of the meeting and introduce the speaker; can bring other visuals to be seen prior to meeting

Holiday Event:

- Logo on "Sponsors" website page and holiday event page
- CAEPC printed signage "Thank you to XYZ sponsor" at event
- 2 free guest registrations
- Table to advertise company information
- Receives a couple of minutes to address event attendees

Spring Event:

- Logo on "Sponsors" website page and spring event page
- CAEPC printed signage "Thank you to XYZ sponsor" at event
- 2 free guest registrations
- Table to advertise company information
- Receives a couple of minutes to address event attendees

Master Website:

- Full year of front page "Banner" visibility
- Logo on "Sponsors" website page

EPG:

- Logo on "Sponsors" website page and EPG event pages and Emerging Professionals' Group page
- CAEPC printed signage "Thank you to XYZ sponsor" at event

Happy Hour Sponsor:

- Logo on "Sponsors" website page
- Table triangles with sponsor recognition at every happy hour event

AEP:

- Logo on "Sponsors" website page and AEP event page
- CAEPC printed signage "Thank you to XYZ sponsor" at event

Meeting Prize:

- Logo on "Sponsors" website page
- Opportunity to speak at the end of continuing education events and announce winner

Dinner Wine:

- Logo on "Sponsors" website page
- Table triangles on every table with sponsor recognition at every dinner program

Technology Sponsor:

- Logo on "Sponsors" website page
- Table triangles with sponsor recognition at every dinner program and recognition on Zoom