

Sponsorship Proposal





Founded in the 1960s, the Central Arizona Estate Planning Council boasts a membership of approximately 200 professionals working in the greater Phoenix Arizona area, that specialize in legal, accounting, insurance, investment, trust and valuation professions, as well as representatives from various charitable organizations. The Council is committed to expanding estate planning knowledge and expertise, growing professional contacts & relationships, and, ultimately, enhancing the community by facilitating superior client service.

Businesses searching for creative and interactive ways to reach new, loyal and active professionals are invited to partner with the Central Arizona Estate Planning Council (CAEPC)

By partnering with CAEPC you can increase your business exposure within the Estate Planning professional base.

The cross-marketing opportunities will benefit your business and strengthen your roots in the community and surrounding areas.

We offer many sponsorship opportunities that can be tailored to fit your marketing goals and budget.

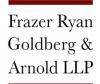
Get face to face with over 300 new customers!

Here are some of our current and past sponsors:









































CAEPC SPONSORSHIP BENEFITS & DETAILS	Spring Event	Holiday PGy	February 4 Hour Program	Meeting	Wine	Website	Public Outreach	EPG	AEP
Value	\$3000	\$3000	\$3500	\$3000	\$1700	\$2000	\$1000	\$1000	\$2000
Sponsorships Available	1		2	4	1	1	2	3	2
Introduce meeting presenter at chosen program	*	L	*	*	0				
Logo on program Power Point	*		*	*	*	*	*	*	*
Logo and Link on CAEPC Website	*		*	*	D	*	*	*	*
Sponsor Ribbon on Name Badge at chosen program	*	*	*	*	0			At EPG Events	At AEP Events
Recognition on all chosen program advertising	*	*	*	*	U	*	*	*	*
Sponsor Exhibit table at chosen program	*	*	*	*	Ţ			At EPG Events	At AEP Events
2 tickets to sponsored program	*	*	*	*					
Recognition on Chosen program welcome sign	*	*	*	*	*				
Recognition on Table tents on each table	*	*	*	*	*				
Recognition at all EPG Events								*	
Sponsor ribbon on name badge at all EPG Events								*	
Recognition on all AEP Event Advertising and at all AEP Events									*
Banner ad on Website Front page						*			
Recognition on chosen Public Outreach Event							*		

Other Sponsorship Opportunities

* Custom Sponsorships

Are you interested in providing support to the Central Arizona Estate Planning Council (CAEPC) with something that is not mentioned in this proposal? Do you have a unique idea of how you can partner your business with CAEPC? Sponsorship proposals can be customized to meet your business needs by contacting our sponsorship coordinator.

* In-Kind Opportunities

Many of our sponsors are able to provide us with great products and services in exchange for sponsorship recognition! If you are interested in adding in-kind value to your cash sponsorship or providing a full in-kind sponsorship, please contact our sponsorship coordinator.

Sponsorship Coordinator Laurie Williams Account Executive CAEPC info@caepc.com 602-289-5761

2017-2018 Program Schedule:

October 2, 2017: 529 Plans as an Estate Planning Tool - What you need to know.

Presenter Brian Boswell

November 6, 2017: Charitable Gifts of Business Assets & Interests...and What Happens When Charitable Gifts Go Awry. Presenter Jason Havens—**Sponsorship already reserved**

December 4, 2017 Holiday Event: A Primer on Tax, Estate Planning and other Issues Relevant to Art Collection and Their Advisors. Presenter: Paul Frimmer: Loeb & Loeb LLP **Followed by Holiday Party!** Sponsorship already reserved

January 8, 2018: 2018 Economic Update

Presenter: George Russell, Franklin Templeton Investments – Sponsorship Already reserved

February 5, 2018: ½ day program:

1st **Half:** *Current Estate Planning and Charitable Giving Updates.* Presenter: Robert S. Keebler: Keebler & Associates, LLP – **Sponsorship Already Reserved**

2nd Half: Annual Tax Update. Presenter: Robert S. Keebler: Keebler & Associates, LLP

March 5, 2018: What Dead Celebrities Can Teach Us About Estate Planning.

Presenter: John J. Scroggin: Scroggin & Company

April 25, 2018 Spring Event!

May 7, 2018 ETHICS PROGRAM! How Slippage and Gray Areas Lead Us Into Ethical Lapses.

Presenter: Marianne Jennings: The Ethical Barometer

SPONSORSHIP FORM

Please fill-out the following form to confirm your chosen sponsorship level. Completed forms can be returned to Laurie Williams at info@caepc.com Please don't hesitate to contact us with any questions 480-289-5761

CONTACT INFORMATION:

Company Name (as you wish to be acknowledged)	Contact Person's Name					
Company Email Address	Contact Phone Number					
Address	City/State/Zip Code					
SPONSORSHIP OPPORTUNITIES:						
\$3,000 Meeting Sponsor	·					
(4 sponsorships Available) 1 st choice 2 nd Choice Please put program date	\$ 2,000 Public Outreach Sponsorship (2 Available)\$ \$1,000 EPG Sponsorship					
\$ 3,500 February ½ day Program	(3 sponsorships available)					
(2 sponsorships available)	\$2,000 AEP Sponsorship (2 Sponsorships Available)					
\$ 3,000 Holiday or Spring Event (1 sponsorship per Event) Please circle Sponsorship Choice	\$500 + Custom Sponsorship					
\$2,000 Program Wine Sponsor (1 Sponso shir) Available	Once we receive your completed sponsorship form, we will contact you to discuss arrangements, sponsorship benefits and recognition.					
\$2,000 Website Sponsor	Please send your high-resolution color and black-and-white					
PAYMENT INFORMATION:	logos (.jpg or PDF preferred) to Laurie Williams Account Executive at info@caepc.org					
Please send me an invoice	All materials will be sent for your approval before going to print.					
I have enclosed a check made payable to the CAEPC	у станувания в село до проделения постору по до проделения по до до проделения по до проделения по до проделения по до проделения					
Please charge my credit card Card	Type: Visa / MC / AmEx / Discover					
Card Number	Expiration Date Security Code					
\$						
Total Sponsorship Commitment Authorized Sponsor Signature Date						

Thank You.



The Mission of the CAEPC is to strengthen the estate planning profession in the Phoenix area by:

- Providing high quality continuing education
- Sponsoring networking opportunities, and
- Fostering a multi-disciplinary approach to estate planning



caepc.com * 480-289-5761

* Laurie Williams Account Executive

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