

2017-2018



## Sponsorship Proposal

# About



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:**



Frazer Ryan  
Goldberg &  
Arnold LLP





CAEPC SPONSORSHIP BENEFITS & DETAILS	Spring Event	Holiday Party	February 4 Hour Program	Meeting	Wine	Website	Public Outreach	EPG	AEP
Value	\$3000	\$3000	\$3500	\$3000	\$1000	\$2000	\$1000	\$1000	\$2000
Sponsorships Available	1	1	2	4	1	1	2	3	2
Introduce meeting presenter at chosen program	*	*	*	*	*				
Logo on program Power Point	*	*	*	*	*	*	*	*	*
Logo and Link on CAEPC Website	*	*	*	*	*	*	*	*	*
Sponsor Ribbon on Name Badge at chosen program	*	*	*	*	*			At EPG Events	At AEP Events
Recognition on all chosen program advertising	*	*	*	*	*	*	*	*	*
Sponsor Exhibit table at chosen program	*	*	*	*	*			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](mailto: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:**

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

**2<sup>nd</sup> 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](mailto: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<sup>st</sup> choice \_\_\_\_\_ 2<sup>nd</sup> Choice \_\_\_\_\_ **Please put  
program date**

\_\_\_\_ \$ 2,000 Public Outreach Sponsorship  
( 2 Available)

\_\_\_\_ \$1,000 EPG Sponsorship  
( 3 sponsorships available)

\_\_\_\_ \$ 3,500 February ½ day Program  
( 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 Sponsorship Available)

\_\_\_\_ \$2,000 Website Sponsor

## PAYMENT INFORMATION:

\_\_\_\_ Please send me an invoice

\_\_\_\_ I have enclosed a check  
made payable to the CAEPC

\_\_\_\_ Please charge my credit card

Card Type: Visa / MC / AmEx / Discover

Once we receive your completed sponsorship form, we will contact you to discuss arrangements, sponsorship benefits and recognition.

Please send your high-resolution color and black-and-white logos (.jpg or PDF preferred) to Laurie Williams Account Executive at [info@caepc.org](mailto:info@caepc.org)

All materials will be sent for your approval before going to print.

\_\_\_\_\_  
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



[caepec.com](http://caepec.com) \* 480-289-5761

\* Laurie Williams Account Executive

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