



# Central Arizona Estate Planning Council 2020-2021 Season

## Sponsor Commitment Form

*Preferred meeting  
(pick two)*

Meeting Dates	Event Description and Sponsor Cost	1 <sup>st</sup> Choice	2 <sup>nd</sup> Choice
Oct 5, 2020	<b>October Continuing Education Event – Life Insurance</b> <i>Ann Marie Liotta, CPA, AEP</i> <i>Cohn Financial Group</i>	<input type="checkbox"/> <i>Reserved</i>	<input type="checkbox"/> <i>Reserved</i>
Nov 2, 2020	<b>November Continuing Education Event – Ethical and Professional Challenges of Dealing with Elder Financial Abuse</b> <i>Mary Radford - Professor at Georgia State University</i>	<input type="checkbox"/>	<input type="checkbox"/>
Dec 7, 2020	<b>Holiday Party</b> <i>Two Sponsorships Available; sponsor one or both!</i>	<input type="checkbox"/>	<input type="checkbox"/>
Jan 4, 2021	<b>January Continuing Education Event – Economic Update</b> <i>Yung Yu-Ma and Michael Stritch</i> <i>BMO Wealth Management</i>	<input type="checkbox"/> <i>Reserved</i>	<input type="checkbox"/> <i>Reserved</i>
Feb 1, 2021 <i>½ Day Program</i>	<b>1<sup>st</sup> Half – Federal Tax Update</b> <i>Sam Donaldson, JD, LL.M.</i> <i>Professor at Georgia State University</i>	<input type="checkbox"/> <i>Reserved</i>	<input type="checkbox"/> <i>Reserved</i>
Feb 1, 2021 <i>½ Day Program</i>	<b>2<sup>nd</sup> Half – TBD</b> <i>Sam Donaldson, JD, LL.M.</i> <i>Professor at Georgia State University</i>	<input type="checkbox"/>	<input type="checkbox"/>
Mar 1, 2021	<b>March Continuing Education Event – TBD</b> <i>Paul S. Lee</i> <i>Northern Trust</i>	<input type="checkbox"/> <i>Reserved</i>	<input type="checkbox"/> <i>Reserved</i>
TBD	<b>Annual Spring Event</b>	<input type="checkbox"/>	<input type="checkbox"/>
May 3, 2021	<b>May Continuing Education Event – Ethics</b> <i>Nancy B. Rapoport</i> <i>UNLV William S. Boyd School of Law</i>	<input type="checkbox"/>	<input type="checkbox"/>
2020-2021 Season	Master Website Sponsor <i>A full year of front-page visibility!</i>	<input type="checkbox"/> <i>Reserved</i>	<input type="checkbox"/> <i>Reserved</i>
2020-2021 Season	Emerging Professionals’ Group Scholarship <i>Three sponsorships available; sponsor one or all three</i>	<input type="checkbox"/>	<input type="checkbox"/>
2020-2021 Season	Happy Hour Networking Events (3 events)	<input type="checkbox"/>	<input type="checkbox"/>
2020-2021 Season	Accredited Estate Planner (AEP) Event Sponsor	<input type="checkbox"/>	<input type="checkbox"/>
2020-2021 Season	Meeting Prize Sponsor	<input type="checkbox"/> <i>Reserved</i>	<input type="checkbox"/> <i>Reserved</i>
2020-2021 Season	Webinar/Leimberg Sponsor	<input type="checkbox"/> <i>Reserved</i>	<input type="checkbox"/> <i>Reserved</i>



# Central Arizona Estate Planning Council 2020-2021 Season

## Sponsor Commitment Form (p 2)

- This sponsorship commitment form is your key to securing your sponsorship.
- Complete both pages and return by *either* fax or e-mail. 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 2020-2021 season after June 1, 2020, 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 Sponsor 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](mailto:info@caepec.org)

8. Attached, via e-mail, is our press quality logo (format preferred .tif or .jpg, 300 dpi or higher quality, file size not to exceed 1MB) [info@caepec.org](mailto:info@caepec.org)

9. Anticipated visibility for 2020-2021 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 18, 2020, 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://Central Arizona Estate Planning Council)

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### 2020-2021 Season Sponsor Benefits Outline

#### Continuing Education Event Sponsor:

- 5 free guest registrations
- Virtual break-out room after presentation
- Logo on "Sponsors" website page and specific event page
- CAEPC printed signage "Thank you to XYZ sponsor" on rotating PowerPoint at beginning of presentation
- Representative from company gets introduced by President to speak for a moment and introduce the speaker

#### 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