



Central Arizona Estate Planning Council 2024-2025 Season

Sponsor Commitment Form

*Preferred meeting
(choose two)*

Meeting Dates	Event Description and Sponsor Cost	1 st Choice	2 nd Choice
October 7, 2024	October Continuing Education Event <i>Bernard A. Krooks, Topic: Elder Law and Special Needs Planning Representing Clients with Diminished Capacity</i>	<input type="checkbox"/> Reserved	<input type="checkbox"/> Reserved
December 2, 2024	December Continuing Education Event <i>Sharon L. Klein, Topic: The Intersection of Divorce & Estate Planning: The Top Tax/Planning Tips & Traps You Need to Know</i>	<input type="checkbox"/>	<input type="checkbox"/>
January 27, 2024	January Continuing Education Event <i>Ballet Arizona (Offsite)</i> <i>David A. Diamond, Topic: Just Because You Can, Doesn't Always Mean You Should: Directed Trusts, Trust Modifications, and Silent Trusts</i>	<input type="checkbox"/> Reserved	<input type="checkbox"/> Reserved
February 3, 2025 ½ Day Program	Half Day Program - 1st Half – <i>Sam Donaldson, Topic: The Impact of Recent Tax Developments on Contemporary Estate Planning</i>	<input type="checkbox"/> Reserved	<input type="checkbox"/> Reserved
February 3, 2025 ½ Day Program	Half Day Program – 2nd Half – <i>Sam Donaldson, Topic: The Impact of Recent Tax Developments on Contemporary Estate Planning</i>	<input type="checkbox"/> Reserved	<input type="checkbox"/> Reserved
March 3, 2025	March Continuing Education Event – Joint Event with CFA Society <i>Doug Ramsey, Topic: State of the Economy and Financial Markets</i>	<input type="checkbox"/>	<input type="checkbox"/>
April 24, 2025	Annual Spring Golf Tournament <i>Varied Sponsorships Available</i>	<input type="checkbox"/>	<input type="checkbox"/>
May 5, 2025	May Continuing Education Event – <i>Lauren Wolven, Topic: There's a Monster Under My Bed: Story Time With the Model Rules</i>	<input type="checkbox"/> Reserved	<input type="checkbox"/> Reserved
2024-2025 Season	Website Sponsor <i>A full year of front-page visibility!</i>	<input type="checkbox"/> Reserved	<input type="checkbox"/> Reserved
2024-2025 Season	Emerging Professionals' Group Scholarship <i>Two of three sponsorships available</i>	<input type="checkbox"/>	<input type="checkbox"/>
2024-2025 Season	Accredited Estate Planner (AEP) Event Sponsor	<input type="checkbox"/>	<input type="checkbox"/>
2024-2025 Season	Dinner Wine Sponsor (Recognition Every Dinner)	<input type="checkbox"/> Reserved	<input type="checkbox"/> Reserved
2024-2025 Season	Meeting Prize Sponsor (Recognition Every Dinner)	<input type="checkbox"/>	<input type="checkbox"/>
2024-2025 Season	Technology Sponsor (Recognition Every Dinner)	<input type="checkbox"/> Reserved	<input type="checkbox"/> Reserved
2024-2025 Season	Continuing Education Certificate 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 2024-2025 season after June 1, 2024, 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 2024-2025 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.



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2024-2025 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

Website Sponsor:

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

Emerging Professionals' Group (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

AEP:

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

Dinner Wine:

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

Meeting Prize:

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

Technology Sponsor:

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

Continuing Education Certificate Sponsor

- Logo on "Sponsors" website page
- Logo on continuing education certificates for every continuing education event