

Estate Planning Council of Cleveland

2019/2020 SPONSORSHIP OPPORTUNITIES



**Estate Planning Council
of Cleveland**

1120 Chester Ave., Ste. 470
Cleveland, OH 44114

Phone: 216-696-1228
Fax: 216-696-2582

Email: admin@epccleveland.org

Special Events

Annual Meeting & Awards Luncheon Sponsorship • Level of Support \$3,500

Event scheduled on June 9, 2020 at The Union Club (location and date subject to change)

Two sponsors accepted (sponsors must be from different disciplines)

Benefits ·

Table of 8 complimentary registrants for event

Microphone time to welcome guests (shared with second sponsor)

Prominent signage on site

Logo on meeting announcement, in program, and on “patron” page of www.epccleveland.org

Printed name placed on appropriate portion of calendar at www.epccleveland.org

Print recognition in email event reminders

Table at event to display company literature

Special Notices ·

Sponsorship for this event will be offered via lottery if a commitment form is received for more than one company in any discipline. Please return a commitment form by close of business on **Friday, August 16, 2019** if you are interested in sponsoring the Annual Meeting & Awards Luncheon. **The lottery is scheduled for Monday, August 19, 2019 at 11:00 am ET; a company representative is strongly encouraged to attend.**

Any company that receives the Annual Meeting & Awards Luncheon sponsorship will be ineligible to participate the year immediately following *unless* a firm in the same discipline does not step forward with their interest in sponsoring.

Social Event Sponsorship • Level of Support \$1,000

Fall 2019, location and date TBD

One sponsor accepted

Benefits ·

5 complimentary registrations to the event

Prominent signage at the event

Logo recognition in event announcement and on calendar event at www.epccleveland.org

Ability to place company materials on literature table at event

Microphone time to welcome guests

Sponsorship for this event will be offered via lottery if a commitment form is received from more than one company. Please return a commitment form by close of business on **Friday, August 16, 2019** if you are interested in sponsoring the social event. **The lottery is scheduled for Monday, August 19, 2019 at 11:00 am ET; a company representative is strongly encouraged to attend.**

Tax and Legal Updates

Luncheon Tax and Legal Update Sponsorship • Level of Support \$1,000 / 3 Month Period

All periods payable immediately following the lottery.

Period 1 – September, October, November

Period 2 – December, January, February

Period 3 – March, April, May

Benefits •

Company supplies logo and/or text for printed Tax and Legal Update

Logo placement on pre-program PowerPoint presentation

Two complimentary registrants at each monthly luncheon for the period of sponsorship

Special Notice •

Sponsorship for this category is typically in very high demand with more than three interested organizations wanting to participate. If you are interested, please return your commitment form by the close of business on **Friday, August 16, 2019**. If we receive more than three sponsor requests, we will hold a lottery drawing on **Monday, August 19, 2019 at 11:00 am ET** via teleconference. We encourage a company representative to attend. In the unlikely event there are less than three interested sponsors, you may have an opportunity to sponsor more than one period.

Breakfast Tax and Legal Update Sponsorship • Level of Support \$1,000 / 4 Breakfasts

Made payable immediately following the lottery.

September, October, February, April

Benefits •

Company supplies logo and/or text for printed Tax and Legal Update

Logo placement on pre-program PowerPoint presentation

Two complimentary registrants at each of the four breakfast meetings

Special Notice •

We anticipate sponsorship for this category to be in high demand with multiple organizations wanting to participate. If you are interested, please return your commitment form by the close of business on **Friday, August 16, 2019**. If we receive more than one request, we will hold a lottery drawing on **Monday, August 19, 2019 at 11:00 am ET** via teleconference. We encourage a company representative to attend.

Luncheons & Breakfasts

Regular Monthly Luncheon Sponsors • Level of Support \$900

September 2019 – May 2020 (luncheon meetings generally held on the 2nd Tuesday of each month at 11:30 am and take place at The City Club, date and location subject to change)

One sponsor accepted per luncheon

Benefits ·

Table of 8 complimentary registrants for event

Literature table at event

Signage with company logo on-site

Recognition on pre-program PowerPoint presentation: *logo and maximum 60 word description*

Opportunity to choose dessert of the month (make selection on commitment form)

Logo on meeting announcement

Print recognition on appropriate portion of calendar at www.epccleveland.org

Logo placement on “patron” page of www.epccleveland.org for the month associated with company support

Special Notice & Instructions ·

*Assigned on a first come, first serve basis. You may wish to contact the Council office to find out which months are available prior to returning commitment form. Commitment requested by **August 30, 2019.***

Breakfast Sponsors • Level of Support \$1,200

September, October, February, April (breakfast meetings generally held on the last Wednesday of the month at 8:00 am and take place at Corporate College East for East Side Breakfasts and LaCentre Conference Center for West Side Breakfasts, date and location subject to change)

Option 1 – One West Side Breakfast (September 25, 2019)
and One East Side Breakfast (April 29, 2020)

Option 2 – One East Side Breakfast (October 30, 2019)
and One West Side Breakfast (February 26, 2020)

Benefits ·

Table of 8 complimentary registrants for both events

Literature table at event

Signage with company logo on-site

Recognition on pre-program PowerPoint presentation: *logo and maximum 60 word description*

Logo on meeting announcement

Print recognition on appropriate portion of calendar at www.epccleveland.org

Logo placement on “patron” page of www.epccleveland.org for the month associated with company support

Special Notice & Instructions ·

*Assigned on a first come, first serve basis. You may wish to contact the Council office to find out which options are available prior to returning commitment form. Commitment requested by **August 30, 2019.***

Special Note about Breakfast & Luncheon Sponsorships...



Your sponsorship of a breakfast or luncheon is not of a specific speaker and does not offer the opportunity to provide a speaker for the event. While we do our very best to monitor the monthly speaker vs. sponsor relationship, we cannot guarantee that a conflict between the sponsoring company and speaker will not arise. There may be a time when the speaker and sponsor are practicing within the same discipline.

Website Placement

Website Sponsorship Opportunities

Top of Page Banner Ad · Level of Support \$1,000

5 sponsors accepted (5 banners rotate in no particular order)

Large company logo/banner placed on the top of each page of www.epccleveland.org for one year from the date of posting

Benefits ·

One year of click history available at the end of year one

Complimentary placement on “patron” page of www.epccleveland.org

Online exposure to over 400 EPC Cleveland members and guests using site on a regular basis

Special Instructions ·

Company must supply the Council office with ready-made banner in a gif file of the standard 480 X 60 pixels size

Home Page Tile Ad · Level of Support \$500

Small company logo/tile ad placed on the right hand side of the www.epccleveland.org homepage for one year from the date of posting

Benefits ·

One year of click history available at the end of year one

Online exposure to EPC Cleveland members and guests using site on a regular basis

Special Instructions ·

Company must supply the Council office with ready-made tile ad in a gif file of the standard 120 X 60 pixels size

Special Note about Website Sponsorships...

** All applications for advertisements on the site must be accompanied by an artwork sample and are subject to approval by the Board of Directors. The Board reserves the right to review advertisements and linked web sites on an ongoing basis and terminate this agreement at any time if it deems the information is not in keeping with the principles and professionalism required of an interdisciplinary organization for professionals involved in various aspects of estate planning. No action will be taken by the Board until final payment has been processed.*

EPC Cleveland · 2019/2020 Sponsorship Commitment Form

Please check your desired level/type of sponsorship here...

Annual Meeting & Awards Luncheon \$3,500 <i>Commitment required by Friday, August 16, 2019. See page 1 for additional details.</i>	<u>Primary Discipline (circle one)</u> legal accounting banking trust planned giving other: _____
Social Event \$1,000 <i>Commitment required by Friday, August 16, 2019. See page 1 for additional details.</i>	
Luncheon Tax and Legal Update \$1,000/period <i>Commitment required by Friday, August 16, 2019. See page 2 for additional details.</i>	<input type="checkbox"/> We are interested in one period. <input type="checkbox"/> We are interested in more than one period.
Breakfast Tax and Legal Update \$1,000 <i>Commitment required by Friday, August 16, 2019. See page 2 for additional details.</i>	
Regular Monthly Luncheon \$900 <i>Commitment requested by Friday, August 30, 2019. See page 3 for additional details.</i>	<u>Preferred month (circle)</u> September October November December January February March April May <u>Dessert choice (circle one)</u> Luscious Lemon Square, NY Cheesecake, Red Velvet Cake, Strawberry Shortcake, Traditional Tiramisu
Breakfasts \$1,200 <i>Commitment requested by Friday, August 30, 2019. See page 3 for additional details.</i>	<u>Preferred option (circle)</u> Option 1 Option 2 September/April October/February
Website Banner Ad \$1,000 <i>See page 4 for additional details.</i>	
Website Tile Ad \$500 <i>See page 4 for additional details.</i>	

COMPANY CONTACT INFORMATION

COMPANY NAME (exactly as you wish it to appear on all material): _____

Contact Name: _____ Telephone #: _____

Email Address: _____

Address: _____

City, State & Zip: _____

PROMOTIONAL MATERIAL CONTACT (ads, logos, etc..)

Contact Name: _____ Telephone #: _____

Email Address: _____ Fax #: _____

PAYMENT INFORMATION

\$ _____ Check Enclosed _____ Charge my credit card *or* _____ Invoice me (Annual Meeting sponsors only, please)

Card Number _____ Exp. Date _____

Signature _____