

Estate Planning Council of Cleveland

2026 - 2027

SPONSORSHIP OPPORTUNITIES

About the Estate Planning Council of Cleveland & Sponsorship Opportunities

Thank you for your interest in becoming a sponsor of the Estate Planning Council of Cleveland! EPC Cleveland is a multi-disciplinary organization of around 400 members who share a common belief that a client is best served by the team concept of estate planning. We admit to membership attorneys, trust officers, accountants, insurance and financial planners, planned giving professionals, as well as allied professionals.

We're excited to offer sponsorship opportunities for EPC Cleveland this coming program year! As a sponsor, your organization will gain visibility among professionals passionate about the team approach to estate planning. Sponsorship options include brand recognition on our meeting announcements, on our website, and at our meetings and special events, among other great benefits! Join us in supporting meaningful dialogue and networking in the Cleveland estate planning community.

Our programming attracts a diverse group of professionals, making them a prime opportunity for meaningful exposure and community engagement. To continue offering high-quality programming and expand our reach, we are seeking sponsors who share our vision of promoting excellence in estate planning in the greater Cleveland area. We would be thrilled to discuss a partnership with you!

Estate Planning Council of Cleveland Board of Directors

ESTATE PLANNING COUNCIL OF CLEVELAND

2001 CROCKER ROAD, SUITE 510 · WESTLAKE, OH 44145
(216) 696-1228 · ADMIN@EPCCLEVELAND.ORG

Special Events

Special Awards Celebration Sponsorship - \$8,000 (One Available) *

TBD June 2027, Shoreby Club

This special event will recognize our 2027 Distinguished Estate Planner and Exceptional Service Award Winner(s)

Benefits

- 16 complimentary registrants for the event
- Microphone time to welcome guests
- 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
- Ability to place company materials on literature table at event

Social Event Sponsorship - \$1,750 (One Available) *

TBD October or November 2026, Location TBD

This annual social event is typically held at a unique venue with an experience component

Benefits

- 5 complimentary registrations to the event
- Microphone time to welcome guests
- 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

Tax and Legal Updates

Tax and Legal Update Sponsorship - \$1,400 (Three Available) *

Period 1 – September, October, November

Period 2 – December (breakfast), January, February

Period 3 – March, April (breakfast), May

Benefits

- Company supplies logo and/or text for placement on footer of Tax and Legal Update
- Logo placement on pre-program PowerPoint presentation and verbal mention during introduction
- Tax and Legal Update placed permanently on website
- Two complimentary registrants at each monthly meeting for the period of sponsorship

***Special Notice**

Sponsorships for these categories are typically in high demand with more organizations wanting to participate than the allotted number of spots available. If you are interested, please return your commitment form by the close of business on **August 17, 2026**. If we receive more the allotted sponsor requests in any given category, we will hold a lottery drawing on **Wednesday, August 19, 2026 at 11:00 am ET** via Zoom. This lottery will also determine which period organizations receive for the Tax and Legal Update. We encourage a company representative to attend.

Monthly Meetings

Monthly Meeting Sponsor - \$1,200 (One Sponsor per Meeting, Nine Available)

September 2026 – May 2027, Locations vary

Luncheon meetings: 2nd Tuesday of September-November, and January-March, at The Union Club of Cleveland

Breakfast meetings: December 2, 2026 and April 21, 2027 in Independence

May luncheon will be a joint program with the Tax Club of Cleveland at the Marriott (exact date TBD)

(dates and locations subject to change)

Benefits

Table of 6 complimentary registrations for 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 months are available prior to returning commitment form.



Special Note about monthly meeting sponsorship...

Your sponsorship of a monthly meeting 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 - \$500 (Five sponsors accepted - banners rotate in no particular order)

Company logo/banner placed on the top of each page of www.epccleveland.org.

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 ready-made banner in the size of 480 X 60 pixels.

Home Page Tile Ad - \$250

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 ready-made banner in the size of 120 X 60 pixels.

2026- 2027 Sponsorship Commitment Form

Commitment required by Monday, August 17, 2026.

Please check your desired level/type of sponsorship here

	Special Awards Celebration - \$8,000 <i>See page 2 for additional details.</i>	
	Social Event - \$1,750 <i>See page 2 for additional details.</i>	
	Tax and Legal Update - \$1,400/period <i>See page 2 for additional details.</i>	☐ We are interested in one period. ☐ We are interested in more than one period.
	Monthly Meeting - \$1,200 <i>See page 3 for additional details.</i>	<u>Preferred month (check)</u> September October November December January February March April May
	Website Banner Ad - \$500 <i>See page 3 for additional details.</i>	
	Website Tile Ad - \$250 <i>See page 3 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: _____

PAYMENT INFORMATION

\$ _____ Check Enclosed ☐ Charge my credit card

Card Number _____ Exp. Date _____ CVC _____

Signature _____