



# Sponsorship Opportunities

Thank you for your interest in considering a sponsorship opportunity with the Philadelphia Estate Planning Council (PEPC).

As you may know, PEPC was one of the first estate planning councils in the country. Today, we are the largest estate planning council in the United States with over 700 estate planning professionals.

As a PEPC event sponsor, you will have recognition and signage at the selected event displaying your brand to our large and growing membership. Luncheon meeting sponsors are also invited to make a brief presentation before the featured speaker is introduced.

PEPC holds many types of events throughout the year that provide opportunities for varying levels of sponsorship and advertising. Examples include networking events, lunch seminars, brown bag round table discussions, women's initiative events, special events, our annual golf and tennis outing, our highly

regarded e-newsletter, the website and our premier annual meeting. Your sponsorship enables PEPC to provide high quality programming and events for our diverse membership.

Sponsorship and advertising is limited to organizations that are affiliated with the estate planning community. If you are interested in becoming a sponsor or advertiser, or would like more information, please contact the PEPC Office at [staff@philaepc.org](mailto:staff@philaepc.org) or 215-486-6215.



## PEPC AT A GLANCE

The Philadelphia Estate Planning Council is made up of a diverse group of estate planning professionals in the Philadelphia area. Below is a snapshot of the industries that our membership represents.

Attorneys	29%	Accounting	7%
Banking/Trust Administration	20%	Valuation/Appraisal	4%
Financial Planning	16%	Charitable Planned Giving	3%
Investments	10%	Other	3%
Insurance	8%		

Luncheon Programs	150-250 attendees	Networking Events	50-100 attendees
Roundtables	50-75 attendees	Golf and Tennis	150 attendees
Annual Meeting	250-275 attendees	Holiday Party	100-150 attendees
Ethics Forum	100-125 attendees		



## SPONSORSHIP OPPORTUNITIES AND BENEFITS

WWW.PHILAEPC.ORG

BENEFITS	PLATINUM SPONSORSHIP	LUNCHEON PROGRAMS	ANNUAL MEETING	OTHER EVENTS
Signage at ALL events	✓			
Company logo and website link on the PEPC website	Home Page	Event Page	Event Page	Event Page
Company logo with website link on all event related email communications	✓	✓	✓	✓
Signage at event	✓	✓	✓	✓
Verbal acknowledgment at event	✓	✓	✓	✓
Complimentary registration (varies by level)	✓	✓	✓	✓
Promotional material made available to attendees	✓	✓	✓	✓
Advertisement in PEPC E-Newsletter	✓	✓		
VIP seating at the President's table		✓		
Opportunity to introduce speaker		✓		
Right of first refusal for renewal	✓			

### PLATINUM SPONSORSHIP

Take advantage of this exclusive partnership and support EVERY aspect of the Philadelphia Estate Planning Council. The PEPC Platinum Sponsorship is a year-long partnership that is limited to five premier companies. Sponsors will receive prominent recognition as a top supporter of PEPC and build brand awareness across multiple forms of media.

#### TYPICAL YEAR - \$7,500

##### *Sponsorship benefits include:*

- Full page, full color advertisement in one council e-newsletter.
- Company logo and link to your website prominently displayed on PEPC website for 12 months.
- Recognition of sponsorship on signage at all council programs and events.
- Verbal acknowledgment of sponsorship by the PEPC president at all council programs and events.
- Two complimentary registrations to six council luncheon programs.
- One complimentary registration to three council social events.
- Complimentary registrations for two representatives from your company to the PEPC Annual Meeting.
- Opportunity to include marketing materials in the attendee giveaway bags at the PEPC Annual Meeting.
- Right of first refusal of sponsorship renewal for the following year.

#### 2020-2021 PARTIAL VIRTUAL

##### *YEAR - \$7,500*

##### *Sponsorship benefits include:*

- Full page, full color advertisement in one council e-newsletter.
- Company logo and link to your website prominently displayed on PEPC website for 12 months.
- Recognition of sponsorship at all events.
  - If virtual, logo will be displayed on opening slides.
  - If in-person, signage at the event.
- Verbal acknowledgment of sponsorship by the PEPC president at all council programs and events.
- Opportunity to make remarks at one virtual luncheon program.
- Four complimentary registrations to six council luncheon programs (3 virtual programs/3 in-person programs).
- One complimentary registration to all council social events.
- Complimentary registrations for two representatives from your company to the PEPC Annual Meeting in May 2021.
- Opportunity to include marketing materials in the attendee giveaway bags at the PEPC Annual Meeting.
- Right of first refusal of sponsorship renewal for the following year.



## SPONSORSHIP OPPORTUNITIES AND BENEFITS

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### LUNCHEON PROGRAM SPONSORSHIP

The PEPC luncheon programs are typically held on the third Tuesday of the month at the Union League of Philadelphia. The luncheons feature nationally known speakers from the estate planning industry with 150 - 250 in attendance. Each program features one sponsor. For 2020-2021, we are planning to conduct our September, October and November programs as a virtual meetings. We hope to return to in-person meetings in early 2021.

#### IN-PERSON PROGRAM - \$3,500

##### *Sponsorship benefits include:*

- Company name, logo and link to your website included on meeting notices, website event listing and email blasts.
- Verbal acknowledgment by the PEPC President at the luncheon.
- Opportunity to make remarks at the luncheon (up to 5 minutes) and introduce the speaker.
- Company name and logo on signage at the event.
- Opportunity to place promotional materials on attendee chairs at the event.
- Complimentary lunch for two representatives from your company with special V.I.P. seating at the President's table.
- Half-page advertisement in the PEPC e-newsletter.
- A special thank you included in an upcoming PEPC e-newsletter.

#### VIRTUAL PROGRAM - \$2,500

##### *Sponsorship benefits include:*

- Company name, logo and link to your website included on meeting notices, website event listing and email blasts.
- Verbal acknowledgment by the PEPC President during opening remarks.
- Opportunity to make remarks or play recorded commercial (up to 5 minutes) at the beginning of the webinar and introduce the speaker.
- Company logo on slides during opening remarks.
- Opportunity to provide promotional materials/videos electronically through PEPC emails.
- Complimentary registration and virtually catered lunch for four representatives from your company.
- Half-page advertisement in the PEPC e-newsletter.
- A special thank you included in an upcoming PEPC e-newsletter.

DATE	SPEAKER	TOPIC
9/15/ 2020	Justin T. Miller – BNY Mellon Wealth Management	Charitable Tax Planning in the Time of Covid-19
10/20/2020	Mitch Drossman – Bank of America Private Bank	Business Succession Planning
11/17/2020	Paul S. Lee – Northern Trust	Post-Election Tax Planning
1/19/2021	Anirban Basu – Sage Policy Group, Inc.	Economic Update
2/16/2021	Richard W. Nenno – Wilmington Trust	State Income Taxation of Trusts
3/16/2021	John Porter – Baker Botts	TBD



## ANNUAL MEETING SPONSORSHIP

The PEPC Annual Meeting will be held at the National Constitution Center in May 2021 (date TBD). A cocktail reception will immediately follow the program and attendees will have access to the "The Story of We the People" exhibit. The Annual Meeting has 15-20 sponsors and attracts over 250-275 attendees.

### IN-PERSON PROGRAM - \$2,000

#### *Sponsorship benefits include:*

- Company name, logo and link to your website included on meeting notices, website event listing and email blasts.
- Verbal acknowledgment by the PEPC President at the program.
- Company name and logo on signage at the event.
- Your choice of either distributing promotional materials on attendee chairs at the event OR a tabletop exhibit during registration and the cocktail reception from 6:00 – 8:00 p.m.
- Complimentary registrations for two representatives from your company.
- 10% discount on an advertisement in the PEPC e-newsletter.



2019 Annual Meeting

### VIRTUAL PROGRAM - \$1,000

#### *Sponsorship benefits include:*

- Company name, logo and link to your website included on meeting notices, website event listing and email blasts.
- Verbal acknowledgment by the PEPC President at the program.
- Company logo on slides during opening remarks.
- Opportunity to include one promotional/marketing item in virtual swag bag which will be mailed to all attendees.
- Complimentary registrations for four representatives from your company.
- 10% discount on an advertisement in the PEPC e-newsletter.



National Constitution Center

## ROUNDTABLE SESSION SPONSORSHIP

PEPC offers 3-4 roundtable sessions per year. We are planning on conducting our fall and winter roundtable programs as virtual meetings. We hope to return to in-person meetings at a Philadelphia location in the spring. The roundtables run from 12:00 to 1:30 p.m. The programs are open to PEPC members only and usually attract 50 - 75 attendees. Each program features one sponsor.

### IN-PERSON PROGRAM - \$750

#### *Sponsorship benefits include:*

- Company name, logo and link to your website included on meeting notices, website event listing and email blasts.
- Verbal acknowledgment at the program.
- Company name and logo on signage at the event.
- Complimentary registrations for two representatives from your company.
- Opportunity to place promotional materials on attendee chairs at the event.

### VIRTUAL PROGRAM - \$750

#### *Sponsorship benefits include:*

- Company name, logo and link to your website included on meeting notices, website event listing and email blasts.
- Verbal acknowledgment by a PEPC board member during opening remarks.
- Opportunity to make remarks or play recorded commercial (up to 5 minutes) at the beginning of the webinar and introduce the speaker.
- Company logo on slides during opening remarks.
- Complimentary registrations for four representatives from your company.



## ETHICS FORUM SPONSORSHIP

PEPC offers one ethics forum program per year. It is usually held in April at a Philadelphia location and attracts about 100-125 attendees. It is typically a two-hour program offering desirable ethics CLE credits for attorneys, as well as regular continuing education credits for other disciplines.

### IN-PERSON PROGRAM - \$750

#### *Sponsorship benefits include:*

- Company name, logo and link to your website included on meeting notices, website event listing and email blasts.
- Verbal acknowledgment at the program.
- Company name and logo on signage at the event.
- Complimentary registrations for two representatives from your company.
- Opportunity to place promotional materials on attendee chairs at the event.

### VIRTUAL PROGRAM - \$750

#### *Sponsorship benefits include:*

- Company name, logo and link to your website included on meeting notices, website event listing and email blasts.
- Verbal acknowledgment by the PEPC President during opening remarks.
- Company logo on slides during opening remarks.
- Complimentary registrations for four representatives from your company.

## GOLF AND TENNIS OUTING SPONSORSHIPS

The outing normally attracts 150 attendees.

The following sponsorships for this event are available at varying price points.

### EVENT SPONSOR - \$1,000

#### *Sponsorship benefits include:*

- Company name, logo and link to your website on outing notices, website event listing and email blasts.
- Verbal acknowledgment at the event during dinner.
- Company name and logo on signage at the event.
- \$100 discount on a foursome registration.



### HOLE SPONSOR - \$300

#### *Sponsorship benefits include:*

- Company name and logo on signage at a designated hole.

### DRINK STATION SPONSOR - \$300

#### *Sponsorship benefits include:*

- Company name and logo on signage at a drink station.



### TENNIS SPONSOR - \$300

#### *Sponsorship benefits include:*

- Company name and logo on signage at tennis courts.



## DROP-IN NETWORKING EVENT SPONSORSHIP -

### \$750 per Event or \$2,500 for Annual Sponsorship

Drop-In Networking Events are held four times a year at various Center City locations from 5:30 – 7:30 p.m. This purely social/networking event is free for members and non-members to attend and it attracts between 50-100 attendees.

#### **Sponsorship benefits include:**

- Company name, logo and link to your website on event notices, website event listing and email blasts.
- Verbal acknowledgment by the PEPC President at the luncheon prior to the event.
- Company name and logo on signage at the event.
- Complimentary registrations for two representatives from your company.



## E-NEWSLETTER ADVERTISING

The newsletter of the Philadelphia Estate Planning Council is published three times a year and is distributed to over 700 PEPC members via email. The newsletter focuses on articles of interest to the estate planning profession and highlights council activities throughout the year. Advertisers taking two or more consecutive issues will receive a 10% discount.

Please contact the PEPC Office for more information on space availability and deadlines.

## RATES

AD SIZE	DIMENSIONS	MEMBER	NON-MEMBER
Full Page	7.5" W x 9.375" H	\$ 1400	\$ 1550
Half Page	7.5" W x 4.5" H	\$ 900	\$ 1050
Quarter Page	3.625" W x 4.5" H	\$ 600	\$ 750

The cover features the PEPC logo and the title "PHILADELPHIA ESTATE PLANNING COUNCIL VOL. XXX, NO. 3 • SUMMER 2010". It includes a photo of President Scott Johnson and a brief article snippet.

**Considerations for Individuals and Closely Held Business Owners Resulting from the "CARES Act"**

By Michael J. Cipolla, Esq.  
David P. Gang, Esq.

**What a long, strange trip it has been....**

It's not often that the terms of a Greatful Death come in the first thing that enters my mind but, as all others have done, we are all thinking about what you President this year, this is exactly what occurred. Little did we know when the year began that the world would be disrupted by a pandemic. We had already successfully survived the annual fall gathering and networking events throughout the year and early winter, in somewhat different ways than our usual participation in in person. Another, in fact, were benefits of all of this. It gave us time to reflect on the needs of our regions taking the necessary steps to protect the health and welfare of our constituents.

And what have I learned throughout this most unusual year? I have discovered just how important it is to have a strong and vibrant Philadelphia Estate Planning Council (PEPC). Let me highlight a few of the reasons why this particular year is of importance:

1. Virtually every council that contained a significant number of our local community leaders - mostly separate, making the decisions necessary to operate their councils and regions, engaging our members and focusing on the present and future.
2. More was asked of our Councils.

...and finally, the membership of PEPC grew over the past year - we are a council almost 700 members strong.

3. Our sponsors continued to value the benefit of supporting PEPC. They along with our members have provided us with the resources to create and present meaningful educational programs and exciting networking opportunities.
4. PEPC is a red resource for closely held businesses and the marketplace of our local leaders.

So, as I return to have Charlie Downing as our executive Director, Art Gitterman, CMP, as our new Vice President, and we were blessed to add a new member to our Board of Directors, the needs of our regions taking the necessary steps to protect the health and welfare of our constituents.

As I look forward to the coming year, I am excited about the opportunities ahead. We have a great deal of work to do to further clarify how to make use of the CARES Act. Taking this into consideration, we will continue to highlight additional characteristics that may be available at time of printing.

**Temporary Waiver of the Excess Business Loss Limitation**

The CARES Act amended the excess coverage on page 2

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To confirm a sponsorship, please contact the PEPC Office:

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