



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 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		



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.



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.

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.



2019 Annual Meeting



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

To confirm a sponsorship, please contact the PEPC Office:

Denise Downing, CMP

Administrative Secretary

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