



## 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 one of the largest estate planning councils in the United States with nearly 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, virtual 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	30%	Accounting	10%
Banking/Trust Administration	18%	Valuation/Appraisal	4%
Financial Planning	18%	Charitable Planned Giving	3%
Investments	8%	Other	2%
Insurance	7%		

Educational 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	150-200 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 - \$7,500**

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.

***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 educational 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.





### EDUCATIONAL PROGRAMS SPONSORSHIP - \$3,500

The PEPC educational programs will be conducted at various times and formats for 2023-2024. The programs are typically held on the third Tuesday of the month at The Union League of Philadelphia. The programs feature nationally known speakers from the estate planning industry and attract between 150-200 people at each program.

Each program features one sponsor.

***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.
- Opportunity to make remarks at the program (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 registration 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.

DATE	SPEAKER	FORMAT
9/19/ 2023	Paul S. Lee Northern Trust	Afternoon Program, Followed by Cocktail Reception
10/17/2023	Bernard A. Krooks, Esq. Littman Krooks LLP	Luncheon Program
11/7/2023	Natalie B. Choate, JD	Webinar
1/23/2024	Steven Mignogna and Kelly Preteroti	Luncheon Program
2/20/2024	Richard W. Nenno Young Conaway Stargatt & Taylor, LLP	Luncheon Program
3/19/2024	Jere Doyle, BNY Mellon	Afternoon Program, Followed by Cocktail Reception



### ANNUAL MEETING SPONSORSHIP - \$2,000

The PEPC Annual Meeting will be held on Thursday, May 23, 2024 at the Barnes Foundation in Philadelphia, PA. The event features a 90-minute educational program, followed by a two-hour cocktail reception. The Annual Meeting attracts between 200-250 people. The PEPC accepts between 15-20 sponsors for this event.

**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.



2023 Annual Meeting



The Barnes Foundation

### ROUNDTABLE SESSION SPONSORSHIP - \$750

PEPC offers 3-4 roundtable sessions per year. The 2023 - 2024 roundtables will continue to be offered in a virtual format. The programs are open to PEPC members only and usually attracts 75 - 100 attendees. Each program features one sponsor.

**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 - \$1,000

PEPC offers one Ethics Forum program per year. The program is typically held in April in Philadelphia and it attracts between 100-150 attendees and features multiple sponsors. The program is a two-hour program offering desirable ethics CLE credits for attorneys, as well as regular continuing education credits for other disciplines.

**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.

### 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 - \$350

**Sponsorship benefits include:**

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

#### DRINK STATION SPONSOR - \$350

**Sponsorship benefits include:**

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



#### TENNIS SPONSOR - \$350

**Sponsorship benefits include:**

- Company name and logo on signage at tennis courts.

## HOLIDAY CELEBRATION SPONSORSHIP - \$1,000

The PEPC Holiday Celebration is held in early December at a unique venue in Philadelphia from 5:30 p.m. – 7:30 p.m.

### *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 prior to the event.
- Verbal acknowledgment at the Holiday Party.
- Company name and logo on signage at the event.
- A special thank you included in an upcoming PEPC e-newsletter.
- Complimentary registrations for two representatives from your company.
- Six-foot skirted table for promotional brochures, if requested.





## 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 estate planning professionals 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, CAE, CMP

Administrative Secretary

P.O. Box 579, Moorestown, NJ 08057

staff@philaepc.org • 215-486-6215