

Estate Planning Council of Cleveland

2024 - 2025

SPONSORSHIP OPPORTUNITIES

ESTATE PLANNING COUNCIL OF CLEVELAND

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

Special Events

Awards Celebration Sponsorship • Level of Support \$4,000

TBD June 2025, Shoreby Club

This special event will recognize our 2025 Distinguished Estate Planner and Exceptional Service Award Winner(s)

*Two sponsors accepted (sponsors must be from different disciplines)
A single sponsor at \$8,000 may also be considered*

Benefits ·

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 **August 28, 2024** if you are interested in sponsoring this awards celebration. **The lottery is scheduled for Friday, August 30, 2024 at 10:00 am ET via Zoom; a company representative is strongly encouraged to attend.**

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

TBD October-November 2024, Location 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

Monthly Meetings

Monthly Meeting Sponsors • Level of Support \$1,000

September 2024 – May 2025, Locations vary

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

Breakfast meetings: December at Corporate College East and April in Independence (exact dates TBD)

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

(dates and locations subject to chance)

One sponsor accepted per meeting

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. Commitment requested by **August 28, 2024.***

Special Note about luncheon sponsorship...



Your sponsorship of a 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.

Tax and Legal Updates

Tax and Legal Update Sponsorship • Level of Support \$1,200 / 3 Month Period

All periods payable immediately following the lottery.

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 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 **August 28, 2024**. If we receive more than three sponsor requests, we will hold a lottery drawing on **Friday, August 30, 2024 at 10:00 am ET** via Zoom. 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.

Website Placement

Website Sponsorship Opportunities

Top of Page Banner Ad · Level of Support \$500

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 \$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 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 · 2024- 2025 Sponsorship Commitment Form

Commitment required by Wednesday, August 28, 2024.

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

Awards Celebration \$4,000 <i>See page 2 for additional details.</i>	<u>Primary Discipline (circle one)</u> legal accounting banking trust planned giving other: _____
Monthly Meeting \$1,000 <i>See page 3 for additional details.</i>	<u>Preferred month (circle)</u> September October November December January February March April May
Tax and Legal Update \$1,200/period <i>See page 4 for additional details.</i>	<input type="checkbox"/> We are interested in one period. <input type="checkbox"/> We are interested in more than one period.
Website Banner Ad \$500 <i>See page 5 for additional details.</i>	
Website Tile Ad \$250 <i>See page 5 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 _____