



## 7th ANNUAL INSTITUTE ON TAX, ESTATE PLANNING AND THE ECONOMY

### SPONSORSHIP OPPORTUNITIES



### **Fashion Island Hotel Newport Beach, California February 15 & 16, 2018**

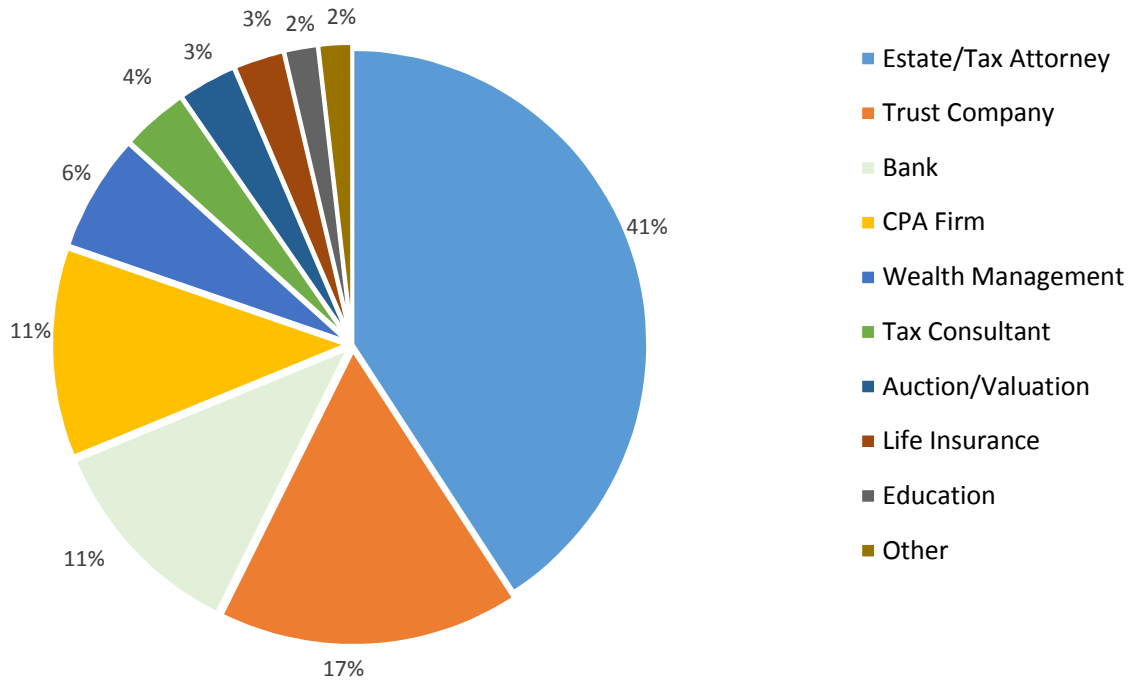
#### **Why Become a STEP OC Institute Sponsor?**

STEP Orange County's Institute on Tax, Estate Planning and the Economy provides you with a platform to interact face-to-face with your clients and meet prospective new ones from across the U.S. The attendees and presenters are attorneys, accountants, financial advisors, insurance agents and other professionals who are owners and employees of businesses engaged in wealth management and preservation services. These are cutting edge professionals who use and need your services and products.

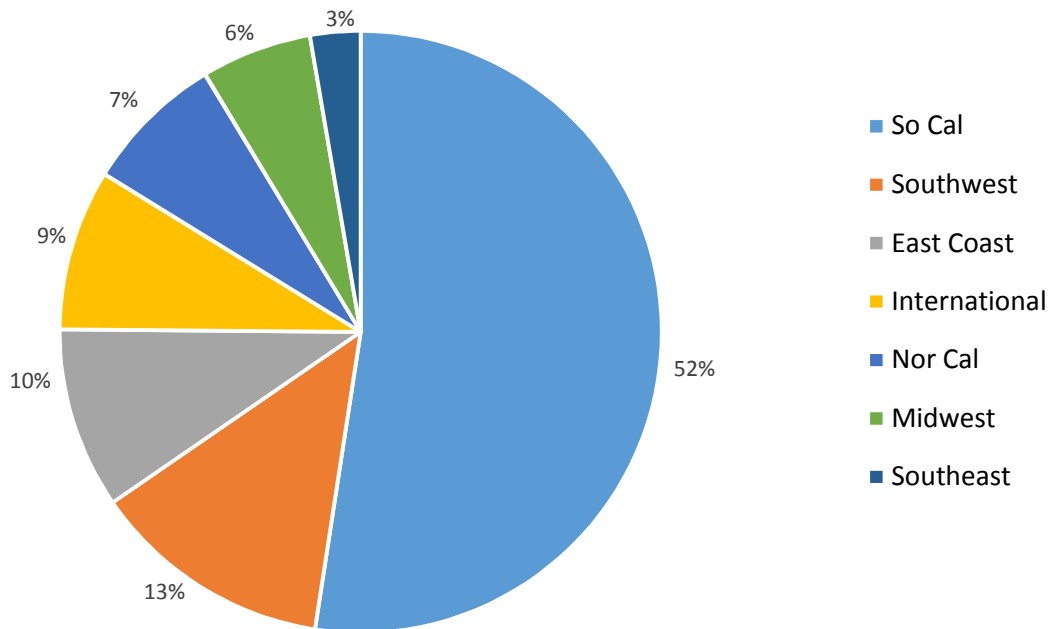
- Put your business in front of an audience of over 200 industry professionals.
- Local, nationwide and international attendance.
- Network with existing clients and build relationships with new clients.
- Show your support of the wealth planning industry.

## Institute Demographics

### 2017 Institute Attendees by Profession



### 2017 Institute Attendance by Region



## Sponsorship at a Glance

	TITLE	RECEPTION	FACULTY	BAG	LANYARD	USB	BREAK	EXHIBIT +	EXHIBIT	PROMO
	\$30,000	\$12,500	\$9,500	\$6,500	\$6,500	\$6,000	\$4,000	\$3,750	\$3,000	\$1,500
Island Corner Suite Two Nights	✓									
Preferred Exhibit Table Placement	✓	✓								
Unique Opportunity	Prominent Display	10 min Presentation	10 min Presentation	Bag	Lanyard	USB	Break Display			
# of Complimentary Registrations (value \$950 each)	2	2	4	1	1	1	1	1		
# of Discounted Registrations \$650 (value \$300 each)	2	2	2	2	2	2	1			
Promoted in Institute Emails	✓	✓	✓	✓	✓	✓	✓	✓		
Announced by Board of Directors	✓	✓	✓	✓	✓	✓	✓	✓		
Thank You Signage	✓	✓	✓	✓	✓	✓	✓	✓		
Advertisement in Institute Materials	Full Page	Half Page	Half Page	Half Page	Half Page	Half Page	Half Page	1/4 Page	1/4 Page	1/4 Page
Exhibit Table	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Exhibit-Only Badge (up to 2)	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Contact List (w/o opt-outs)	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Listing in Institute Materials	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Logo on Website	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	\$30,000	\$12,500	\$9,500	\$6,500	\$6,500	\$6,000	\$4,000	\$3,750	\$3,000	\$1,500
	TITLE	RECEPTION	FACULTY	BAG	LANYARD	USB	BREAK	EXHIBIT +	EXHIBIT	PROMO

**TITLE SPONSOR - EXCLUSIVE**

**NOT AVAILABLE - \$30,000**

**PROMOTE**

- Prominent display of logo and company as Title Sponsor
- One banner prominently displayed in general session room
- Promoted in Institute emails
- Announced during Institute by Board of Directors
- Logo on Thank You signage
- Full page advertisement in Institute materials
- Use of attendee contact list (excluding opt outs)
- Listing in Institute materials

**ATTEND**

- One complimentary Island Corner Suite at the Island Hotel Newport Beach – February 14 through 16, 2018
- Two complimentary Institute registrations (valued up to \$950 each)
- Two additional registrations at the discounted rate of \$650 each (valued up to \$300 each)

**INTERACT**

- One Exhibit Table
- Preferred Exhibit Table placement
- Two Exhibit-Area-Only badges for exhibit staff



## RECEPTION SPONSOR - *EXCLUSIVE*

*NOT AVAILABLE - \$12,500*

### PROMOTE

- 10 minute announcement during the cocktail reception
- Exclusive company signage at the Cocktail Reception
- Promoted in Institute emails
- Announced during Institute by Board of Directors
- Logo on Thank You signage
- Half page advertisement in Institute materials
- Use of attendee contact list (excluding opt outs)
- Listing in Institute materials

### ATTEND

- Two complimentary Institute registrations (valued up to \$950 each)
- Two additional registrations at the discounted rate of \$650 each (valued up to \$300 each)

### INTERACT

- One Exhibit Table
- Preferred Exhibit Table placement
- Two Exhibit-Area-Only badges for exhibit staff



**FACULTY SPONSOR – EXCLUSIVE**

**NOT AVAILABLE - \$9,500**

**PROMOTE**

- 10 minute announcement during the Faculty Dinner
- Exclusive company signage at the Faculty Dinner
- Promoted in Institute emails
- Announced during Institute by Board of Directors
- Logo on Thank You signage
- Half page advertisement in Institute materials
- Use of attendee contact list (excluding opt outs)
- Listing in Institute materials

**ATTEND**

- Four complimentary Institute registrations (valued up to \$950 each)
- Two additional registrations at the discounted rate of \$650 each (valued up to \$300 each)

**INTERACT**

- One Exhibit Table
- Preferred Exhibit Table placement
- Two Exhibit-Area-Only badges for exhibit staff



**BAG SPONSOR - EXCLUSIVE**

**NOT AVAILABLE - \$6,500**

**PROMOTE**

- Company logo on Bags distributed to attendees
- Promoted in Institute emails
- Announced during Institute by Board of Directors
- Logo on Thank You signage
- Half page advertisement in Institute materials
- Use of attendee contact list (excluding opt outs)
- Listing in Institute materials

**ATTEND**

- One complimentary Institute registration (valued up to \$950)
- Two additional registrations at the discounted rate of \$650 each (valued up to \$300 each)

**INTERACT**

- One Exhibit Table
- Two Exhibit-Area-Only badges for exhibit staff



**LANYARD SPONSOR - EXCLUSIVE**

**NOT AVAILABLE - \$6,500**

**PROMOTE**

- Company logo on lanyards distributed to attendees
- Promoted in Institute emails
- Announced during Institute by Board of Directors
- Logo on Thank You signage
- Half page advertisement in Institute materials
- Use of attendee contact list (excluding opt outs)
- Listing in Institute materials

**ATTEND**

- One complimentary Institute registration (valued up to \$950)
- Two additional registrations at the discounted rate of \$650 each (valued up to \$300 each)

**INTERACT**

- One Exhibit Table
- Two Exhibit-Area-Only badges for exhibit staff





**USB SPONSOR - EXCLUSIVE**

**NOT AVAILABLE - \$6,000**

**PROMOTE**

- Company logo on USB flash drives containing Institute materials distributed to attendees
- Promoted in Institute emails
- Announced during Institute by Board of Directors
- Logo on Thank You signage
- Half page advertisement in Institute materials
- Use of attendee contact list (excluding opt outs)
- Listing in Institute materials

**ATTEND**

- One complimentary Institute registration (valued up to \$950)
- Two additional registrations at the discounted rate of \$650 each (valued up to \$300 each)

**INTERACT**

- One Exhibit Table
- Two Exhibit-Area-Only badges for exhibit staff



**BREAK SPONSOR - THREE**

**NOT AVAILABLE - \$4,000**

**PROMOTE**

- Exclusive signage prominently displayed on break tables during one break
- Promoted in Institute emails
- Announced during Institute by Board of Directors
- Logo on Thank You signage
- Half page advertisement in Institute materials
- Use of attendee contact list (excluding opt outs)
- Listing in Institute materials

**ATTEND**

- One complimentary Institute registration (valued up to \$950)
- One additional registration at the discounted rate of \$650 (valued up to \$300)

**INTERACT**

- One Exhibit Table
- Two Exhibit-Area-Only badges for exhibit staff



## EXHIBITOR – UP TO FIFTEEN

Exhibit + One Registration - \$3,750  
Exhibit - \$3,000

### PROMOTE

- Logo on Thank You signage
- Use of attendee contact list (excluding opt outs)
- Listing in Institute materials
- Logo and link on Institute website
- 1/4 page advertisement in Institute materials
- Use of attendee contact list (excluding opt outs)
- Listing in Institute materials

### INTERACT

- One Exhibit Table
- One Exhibit-Area-Only badges for exhibit staff



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COMPANY OF DELAWARE



**PEAK TRUST COMPANY**  
Elevated Trust & Wealth Management Solutions



**InterActive Legal**



**RUTAN**  
RUTAN & TUCKER, LLP

## 2018 Institute Schedule

### Exhibitor Set-up:

Wednesday, February 14 at 7:00 pm to anytime

Thursday, February 15 at 6:00 am to 7:00 am

### Thursday, February 15, 2018 – 7:00 am to 7:30 pm

Continental Breakfast – 60 minutes

Morning Snack Break – 30 minutes

Lunch with Presentation – 75 minutes

Afternoon Snack Break – 30 minutes

Cocktail Reception – 2 hours

### Friday, February 16, 2018 – 7:00 am to 5:30 pm

Continental Breakfast – 60 minutes

Morning Snack Break - 30 minutes

Lunch with Presentation – 90 minutes

Afternoon Snack Break – 20 minutes

### Special Thanks to Our 2017 Institute Sponsors

Allen Haight & Monaghan LLP

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Bryn Mawr Trust Co. of Delaware

City National Rochdale

Clars Auction Gallery

ElderCounsel

FIDELITY Charitable

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HMWC CPA

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US Bank

Verdon Law Group

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**7th ANNUAL INSTITUTE  
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**Sponsor and Exhibitor Commitment Form**

Please fill out the information below including your selected level of participation. You will be contacted to confirm your participation and will be sent an invoice and details regarding your participation. Please note that we can also design tailored sponsorship packages to meet your needs.

First: \_\_\_\_\_ Last: \_\_\_\_\_

Email: \_\_\_\_\_

Title: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip, Country: \_\_\_\_\_

Phone: \_\_\_\_\_ Cell: \_\_\_\_\_

Marketing Contact (if different): \_\_\_\_\_

Marketing Contact Email: \_\_\_\_\_ Phone: \_\_\_\_\_

**Sponsor:**

- Title Sponsor - \$30,000 – NOT AVAILABLE
- Reception Sponsor - \$12,500 – NOT AVAILABLE
- Faculty Sponsor - \$9,500 – NOT AVAILABLE
- Bag Sponsor - \$6,500 – NOT AVAILABLE
- Lanyard Sponsor - \$6,500 – NOT AVAILABLE
- USB Sponsor - \$6,000 – NOT AVAILABLE
- Break Sponsor - \$4,000 – NOT AVAILABLE

**Exhibitor:**

- Exhibitor + One Registration - \$3,750
- Exhibitor - \$3,000

**Promotional:**

- Promotional - \$1,500

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Please send to Kristin Yokomoto at [kristin@stepoc.org](mailto:kristin@stepoc.org) or call 949.263.1040. STEP Orange County thanks you for your interest in sponsoring or exhibiting. We look forward to seeing you soon. [www.stepoc.org](http://www.stepoc.org)