

The logo for STEP (Step of the Pacific) features the word "STEP" in a bold, white, sans-serif font, followed by a stylized white icon of a person's profile.

Orange County

ADVISING FAMILIES ACROSS GENERATIONS

2021 INSTITUTE EXPERIENCE

10TH ANNUAL INSTITUTE ON TAX, ESTATE PLANNING AND THE WORLD ECONOMY

February 8-9, 2021, Virtual Event
Newport Beach, California, USA

The background of the entire page is a photograph of a coastal town, likely Newport Beach, California. It shows a row of multi-story houses built on a hillside, with palm trees scattered throughout. In the foreground, there is a body of water, possibly a harbor or bay, with a pier extending into it. The image is overlaid with a semi-transparent blue filter.

SPONSORSHIP OPPORTUNITIES

www.stepoc.org/institute

SPONSORSHIP OPPORTUNITIES

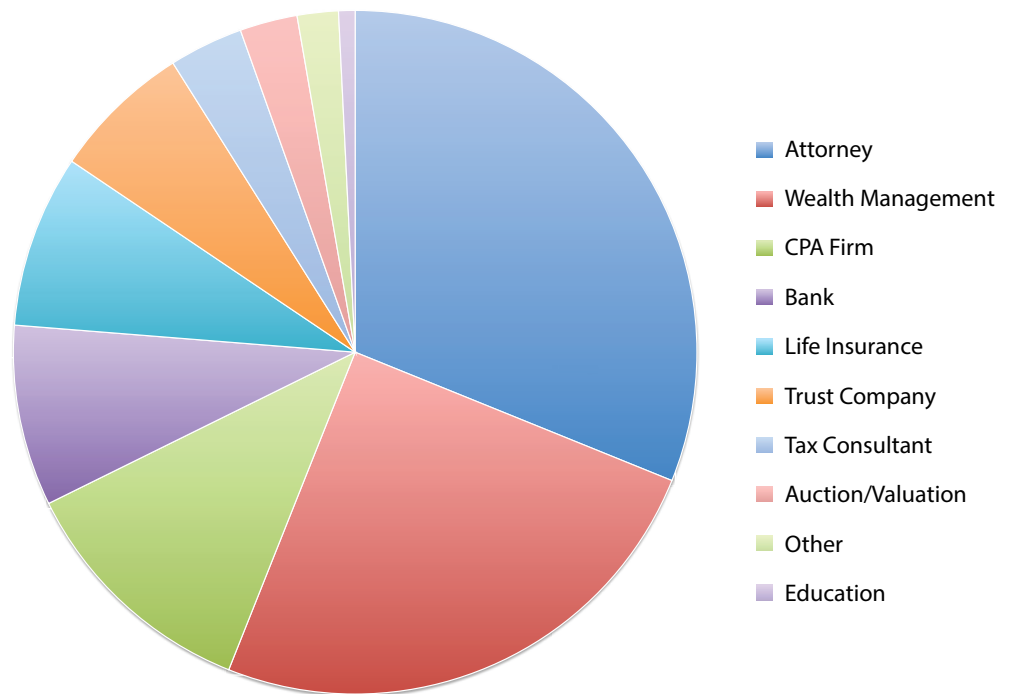
Why Become a STEP Orange County Institute Sponsor?

STEP Orange County's Institute on Tax, Estate Planning and the World Economy provides you with a platform to interact 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.

20% Early Bird Credit for sponsorships paid before 11/6/2020.

2020 Institute Attendees by Profession



SPONSORSHIP OPPORTUNITIES

SPONSORSHIP LEVEL	PRICING	# OF OPPORTUNITIES	PAGE
TITLE SPONSOR	\$7,500	1	5
SILVER SPONSOR	\$5,000	1	6
KEYNOTE LUNCHTIME SPEAKER SPONSOR	\$3,500	2	7
SPEAKERS' GIFT SPONSOR	\$3,500	1	8
MID DAY SPONSOR	\$3,000	2	9
SPEAKER SPONSOR	\$2,500	Multiple	10
EXHIBITOR SPONSOR	\$2,000	Multiple	11
CHARITABLE SPONSOR	\$400	Multiple	12
LOGO SPONSOR	\$300	Multiple	13

TITLE SPONSOR

EXCLUSIVE - \$7,500

PROMOTE

- **5 Minute exclusive announcement at opening of conference each day**
- **Choice of one speaker introduction by video or in person, must be selected by 11/15/20**
- **Company mentioned and recognized 12 times during the two-day conference**
- **Logo on screen during opening, closing and during assigned speaker introduction**
- **Logo on conference brochures and marketing materials as Title Sponsor throughout STEP Worldwide and USA**
- **Large logo on all pages of conference site**
- **Banner ads 12 times during the two-day conference**

Also includes:

- **Logo on conference brochures and marketing materials as sponsor throughout STEP Worldwide and USA**
- **Host Virtual Sponsor Booth with live streaming, contact information, website hyperlink**
- **Ability to create, customize and host virtual booth**
- **Ability to participate in virtual or chat meetings with attendees**
- **Ability to list company representatives hosting booth**
- **On Demand program and booth available for 30 days after Institute**
- **Rotating logo on conference website and exhibit hall**
- **Included in “Thank You” to sponsors each day**
- **List of Conference Attendees to be used twice**
- **Logo featured on conference website**
- **Logo displayed on screen during breaks**
- **Total of four complimentary conference registrations**
- **Opportunity to purchase four additional conference registrations for \$100 each**
- **Booth reporting includes users, visits, and download activity**

20% Early Bird Credit for sponsorships paid before 11/6/2020.

SILVER SPONSOR

EXCLUSIVE - \$5,000

PROMOTE

- **5 Minute exclusive announcement at mid-day of the opening day of conference**
- **Choice of one speaker introduction by video or in person, must be selected by 01/25/21**
- **Company mentioned and recognized 12 times during the two-day conference**
- **Logo on screen during opening, closing and during assigned speaker introduction**
- **Logo on conference brochures and marketing materials as Silver Sponsor throughout STEP Worldwide and USA**
- **Large logo on all pages of conference site**
- **Banner ads 12 times during the two-day conference**

Also includes:

- **Logo on conference brochures and marketing materials as sponsor throughout STEP Worldwide and USA**
- **Host Virtual Sponsor Booth with live streaming, contact information, website hyperlink**
- **Ability to create, customize and host virtual booth**
- **Ability to participate in virtual or chat meetings with attendees**
- **Ability to list company representatives hosting booth**
- **On Demand program and booth available for 30 days after Institute**
- **Rotating logo on conference website and exhibit hall**
- **Included in “Thank You” to sponsors each day**
- **List of Conference Attendees to be used twice**
- **Logo featured on conference website**
- **Logo displayed on screen during breaks**
- **Total of three complimentary conference registrations**
- **Opportunity to purchase four additional conference registrations for \$100 each**
- **Booth reporting includes users, visits, and download activity**

20% Early Bird Credit for sponsorships paid before 11/6/2020.

KEYNOTE LUNCHTIME SPEAKER SPONSOR

Multiple Sponsorships Available - \$3,500

PROMOTE

- **Opportunity to introduce keynote speaker by video or in person, must be selected after 11/15/20 from available speakers and by 11/30/20**
- **Logo on screen during assigned speaker introduction**
- **Banner ads 4 times during the two-day conference**

Also includes:

- **Logo on conference brochures and marketing materials as sponsor throughout STEP Worldwide and USA**
- **Host Virtual Sponsor' Booth with live streaming, contact information, website hyperlink**
- **Ability to create, customize and host virtual booth**
- **Ability to participate in virtual or chat meetings with attendees**
- **Ability to list company representatives hosting booth**
- **On Demand program and booth available for 30 days after Institute**
- **Rotating logo on conference website and exhibit hall**
- **Included in "Thank You" to sponsors each day**
- **List of Conference Attendees to be used twice**
- **Logo featured on conference website**
- **Logo displayed on screen during breaks**
- **Includes two complimentary conference registrations**
- **Opportunity to purchase two additional conference registrations for \$100 each**
- **Booth reporting includes users, visits, and download activity**

20% Early Bird Credit for sponsorships paid before 11/6/2020.

SPEAKERS' GIFT SPONSOR

EXCLUSIVE - \$3,500

PROMOTE

- **Company logo on Speakers' gifts and inclusion of card**
- **Logo on screen during assigned speaker introduction**
- **Banner ads 4 times during the two-day conference**
- **Announcement of the gift sponsor each day**

Also includes:

- **Logo on conference brochures and marketing materials as sponsor throughout STEP Worldwide and USA**
- **Host Virtual Sponsor' Booth with live streaming, contact information, website hyperlink**
- **Ability to create, customize and host virtual booth**
- **Ability to participate in virtual or chat meetings with attendees**
- **Ability to list company representatives hosting booth**
- **On Demand program and booth available for 30 days after Institute**
- **Rotating logo on conference website and exhibit hall**
- **Included in "Thank You" to sponsors each day**
- **List of Conference Attendees to be used twice**
- **Logo featured on conference website**
- **Logo displayed on screen during breaks**
- **Includes two complimentary conference registrations**
- **Opportunity to purchase two additional conference registrations for \$100 each**
- **Booth reporting includes users, visits, and download activity**

20% Early Bird Credit for sponsorships paid before 11/6/2020.

MID DAY SPONSOR

Multiple Sponsorships Available - \$3,000

PROMOTE

- **2 Minute company announcement at mid day**
- **Choice of one speaker to introduce by video or in person, must be selected after 11/30/20 from available speakers and by 12/31/20**
- **Logo on screen during assigned speaker introduction**
- **Banner ads 2 times during the two-day conference**

Also includes:

- **Logo on conference brochures and marketing materials as sponsor throughout STEP Worldwide and USA**
- **Host Virtual Sponsor' Booth with live streaming, contact information, website hyperlink**
- **Ability to create, customize and host virtual booth**
- **Ability to participate in virtual or chat meetings with attendees**
- **Ability to list company representatives hosting booth**
- **On Demand program and booth available for 30 days after Institute**
- **Rotating logo on conference website and exhibit hall**
- **Included in "Thank You" to sponsors each day**
- **List of Conference Attendees to be used twice**
- **Logo featured on conference website**
- **Logo displayed on screen during breaks**
- **Includes two complimentary conference registrations**
- **Opportunity to purchase two additional conference registrations for \$100 each**
- **Booth reporting includes users, visits, and download activity**

20% Early Bird Credit for sponsorships paid before 11/6/2020.

SPEAKER SPONSOR

Multiple Sponsorships Available - \$2,500

PROMOTE

- **Choice of one speaker to introduce by video or in person, must be selected after 1/1/21 from available speakers and by 1/31/21**
- **Logo on screen during assigned speaker introduction**

Also includes:

- **Logo on conference brochures and marketing materials as sponsor throughout STEP Worldwide and USA**
- **Host Virtual Sponsor' Booth with live streaming, contact information, website hyperlink**
- **Ability to create, customize and host virtual booth**
- **Ability to participate in virtual or chat meetings with attendees**
- **Ability to list company representatives hosting booth**
- **On Demand program and booth available for 30 days after Institute**
- **Rotating logo on conference website and exhibit hall**
- **Included in "Thank You" to sponsors each day**
- **List of Conference Attendees to be used twice**
- **Logo featured on conference website**
- **Logo displayed on screen during breaks**
- **Includes two complimentary conference registrations**
- **Opportunity to purchase two additional conference registrations for \$100 each**
- **Booth reporting includes users, visits, and download activity**

20% Early Bird Credit for sponsorships paid before 11/6/2020.

EXHIBITOR SPONSOR

Multiple Sponsorships Available - \$2,000

PROMOTE

- **Logo on conference brochures and marketing materials as sponsor throughout STEP Worldwide and USA**
- **Host Virtual Sponsor' Booth with live streaming, contact information, website hyperlink**
- **Ability to create, customize and host virtual booth**
- **Ability to participate in virtual or chat meetings with attendees**
- **Ability to list company representatives hosting booth**
- **On Demand program and booth available for 30 days after Institute**
- **Rotating logo on conference website and exhibit hall**
- **Included in "Thank You" to sponsors each day**
- **List of Conference Attendees to be used twice**
- **Logo featured on conference website**
- **Logo displayed on screen during breaks**
- **Opportunity to purchase two conference registrations for \$100 each**
- **Booth reporting includes users, visits, and download activity**

20% Early Bird Credit for sponsorships paid before 11/6/2020.

CHARITABLE SPONSOR

Multiple Sponsorships Available - \$400

PROMOTE

- **Logo on conference brochures and marketing materials as sponsor throughout STEP Worldwide and USA**
- **Host Virtual Sponsor' Booth with live streaming, contact information, website hyperlink**
- **Ability to create, customize and host virtual booth**
- **Ability to participate in virtual or chat meetings with attendees**
- **Ability to list company representatives hosting booth**
- **On Demand program and booth available for 30 days after Institute**
- **Rotating logo on conference website and exhibit hall**
- **Included in "Thank You" to sponsors each day**
- **List of Conference Attendees to be used twice**
- **Logo featured on conference website**
- **Logo displayed on screen during breaks**
- **Booth reporting includes users, visits, and download activity**

This sponsorship offered only to non-profit organizations. Must show proof of non-profit status.

20% Early Bird Credit for sponsorships paid before 11/6/2020.

LOGO SPONSOR

Multiple Sponsorships Available - \$300

PROMOTE

- **Logo on conference brochures and marketing materials as sponsor throughout STEP Worldwide and USA**
- **Rotating logo on conference website and exhibit hall**
- **Included in “Thank You” to sponsors each day**
- **List of Conference Attendees to be used twice**
- **Logo featured on conference website**
- **Logo displayed on screen during breaks**

20% Early Bird Credit for sponsorships paid before 11/6/2020.

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AND THE WORLD ECONOMY****February 8-9, 2021, Virtual Event
Newport Beach, California, USA**

Please return your completed form. Upon receipt, an agreement will be sent to you.

First: _____ Last: _____

Title: _____

Company: _____

Address: _____

City, State, Zip, Country: _____

Phone: _____ Email: _____

Sponsorship Level:

- Title Sponsor – \$7,500
- Silver Sponsor – \$5,000
- Keynote Lunch Speaker Sponsor – \$3,500*
- Speakers' Gift Sponsor – \$3,500
- Mid Day Sponsor – \$3,000*
- Speaker Sponsor – \$2,500*
- Exhibitor Sponsor – \$2,000*
- Charitable Sponsor – \$400*
- Logo Sponsor – \$300*

**multiple sponsorships available*

Add to any of the above (except Exhibitor, Charitable or Logo Sponsor packages):

- Add one conference registration – add \$100
- Add two conference registrations – add \$200

Signature: _____ Date: _____

Please return completed form to Anna Fedosova-Caldera.
For more information please contact Anna at 949.863.2341 or Anna.Caldera@usbank.com.