



2023 INSTITUTE EXPERIENCE

**11th ANNUAL INSTITUTE ON TAX, ESTATE
PLANNING AND THE WORLD ECONOMY**

**February 8-9, 2023
Newport Beach, California, USA**

STEP

Orange County

ADVISING FAMILIES ACROSS GENERATIONS

SPONSORSHIP OPPORTUNITIES

www.stepoc.org/institute

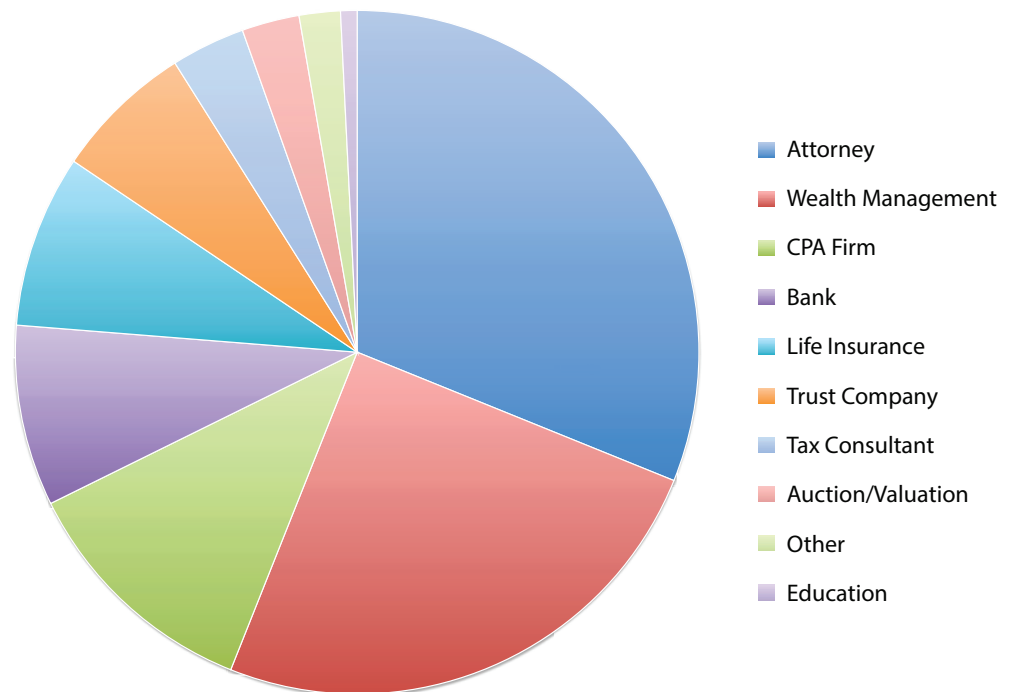
SPONSORSHIP OPPORTUNITIES

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.

2021 Institute Attendees by Profession



TITLE SPONSOR

EXCLUSIVE - \$10,000

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 11/15/22
- Company mentioned and recognized 10 times during the two-day conference
- Logo on screen during opening, closing and during assigned speaker introduction
- Logo on conference marketing materials as Title Sponsor throughout STEP Worldwide and USA
- Large logo on all pages of conference site

Also includes:

- Host Sponsor Booth
- Included in “Thank You” to sponsors each day
- List of Conference Attendees to be used twice
- Logo displayed on screen during breaks
- Total of four complimentary conference registrations
- Opportunity to purchase four additional conference registrations for \$275 each

RECEPTION SPONSOR

EXCLUSIVE - \$8,500

PROMOTE

- 5 Minute exclusive announcement at attendee reception on first day
- Company mentioned and recognized 5 times during the two-day conference
- Logo on screen during opening and closing
- Logo on conference marketing materials as sponsor throughout STEP Worldwide and USA

Also includes:

- Host Sponsor Booth
- Included in “Thank You” to sponsors each day
- List of Conference Attendees to be used twice
- Logo displayed on screen during breaks
- Total of three complimentary conference registrations
- Opportunity to purchase four additional conference registrations for \$275 each

CE SPONSOR

Exclusive - \$8,000

PROMOTE

- Choice of one speaker to introduce by video or in person, must be selected after 1/1/23 from available speakers
- Logo on screen during assigned speaker introduction

Also includes:

- Logo on conference marketing materials as sponsor throughout STEP Worldwide and USA
- 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 one complimentary conference registration
- Opportunity to purchase two additional conference registrations for \$275 each

SILVER SPONSOR

Exclusive - \$7,500

PROMOTE

- Opportunity to introduce speaker by video or in person, must be selected after 11/30/22 from available speakers and by 12/30/22
- Logo on screen during assigned speaker introduction

Also includes:

- Logo on conference marketing materials as sponsor throughout STEP Worldwide and USA
- Host Sponsor Booth
- 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 one complimentary conference registration
- Opportunity to purchase two additional conference registrations for \$275 each

BRONZE SPONSOR

EXCLUSIVE - \$6,500

PROMOTE

- Opportunity to introduce speaker by video or in person, must be selected after 12/1/22 from available speakers
- Logo on screen during assigned speaker introduction

Also includes:

- Logo on conference marketing materials as sponsor throughout STEP Worldwide and USA
- Host Sponsor Booth
- 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 one complimentary conference registration
- Opportunity to purchase two additional conference registrations for \$275 each

SPEAKERS' DINNER SPONSOR

EXCLUSIVE - \$6,000

PROMOTE

- Opportunity to introduce keynote speaker by video or in person, must be selected after 11/15/22 from available speakers and by 11/30/22
- Logo on screen during assigned speaker introduction

Also includes:

- Logo on conference marketing materials as sponsor throughout STEP Worldwide and USA
- Host Sponsor Booth
- 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 one complimentary conference registration
- Opportunity to purchase two additional conference registrations for \$275 each

KEYNOTE LUNCHTIME SPEAKER SPONSOR

Multiple Sponsorships Available - \$5,000

PROMOTE

- Opportunity to introduce keynote speaker by video or in person, must be selected after 11/15/22 from available speakers and by 11/30/22
- Logo on screen during assigned speaker introduction

Also includes:

- Logo on conference marketing materials as sponsor throughout STEP Worldwide and USA
- Host Sponsor Booth
- 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 one complimentary conference registration
- Opportunity to purchase two additional conference registrations for \$275 each

SPEAKER SPONSOR

Multiple Sponsorships Available - \$3,500

PROMOTE

- Choice of one speaker to introduce by video or in person, must be selected after 1/1/23 from available speakers and by 1/31/23
- Logo on screen during assigned speaker introduction

Also includes:

- Logo on conference marketing materials as sponsor throughout STEP Worldwide and USA
- 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 one complimentary conference registration
- Opportunity to purchase two additional conference registrations for \$275 each

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ADVISING FAMILIES ACROSS GENERATIONS

February 10-11, 2022
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 - \$10,000

RECEPTION Sponsor - \$8,500

CE Sponsor - \$8,000

SILVER Sponsor - \$7,500

BRONZE Sponsor - \$6,500

SPEAKER'S DINNER Sponsor - \$6,000

KEYNOTE LUNCHTIME SPEAKER Sponsor* - \$5,000

SPEAKER Sponsor* - \$3,500

**multiple sponsorships available*

Add to any of the above (except Charitable or Logo Sponsor packages) Attendee Registration for \$275/ each, per description page

Signature: _____ Date: _____

Please return completed form to Anna Fedosova. For more information please contact Anna at 949.508-0562 or Anna.Fedosovo@sunstonetrust.com.