



THE NORTHERN CALIFORNIA
PLANNED GIVING COUNCIL

2023
SPONSORSHIP
OPPORTUNITIES

SPONSORSHIP OPPORTUNITIES

30TH ANNUAL PLANNED GIVING CONFERENCE

In-Person: April 24, 2023

- Premier Sponsor (1 Available): \$8,500
- Platinum Sponsor (2 Available): \$7,000
 - Gold Sponsor (3 Available): \$5,500
 - Silver Sponsor (10 Available): \$3,500
 - Bronze Sponsor (Unlimited): \$2,000

LUNCHEON PROGRAMS

In Person: January 19, 2023 and November 16, 2023

Virtual: March 16, 2023 and September 21, 2023

- In-person Event Sponsor: \$1,000
- Virtual Event Sponsor: \$500

HEIDI STRASSBURGER MASTERS PROGRAM

July 20, 2023

- In-person Event Sponsor: \$1,000
- Virtual Event Sponsor: \$750

BASICS COURSE

6 virtual sessions in Fall of 2023, 2 ½ hours each

- Primary Sponsor (1 Available): \$1,500
- Supporting Sponsor (4 Available): \$750

PLANNING IN PRACTICE PROGRAMS

In Person: January 19, 2023 and November 16, 2023

- In-person Event Sponsor: \$750



**For sponsorship information and general conference inquiries,
please contact info@ncpgcouncil.org.**

Northern California Planned Giving Council Hallmark Events

THE 30TH ANNUAL NORTHERN CALIFORNIA PLANNED GIVING CONFERENCE



April 24, 2023
8:00 AM - 5:30 PM
Westin St. Francis • San Francisco

**AN
IN-PERSON
EVENT**

30TH ANNUAL PLANNED GIVING CONFERENCE

For 30 years, Northern California Planned Giving Council has provided top quality educational and networking opportunities at our annual planned giving conference. In 2019, NCPGC hosted over 330 attendees, representing Northern California's top planned giving staff, trust officers, lawyers, CPAs, wealth managers, and investment advisors. This year, we will be holding our first in-person Conference since 2020. We will feature a packed schedule of learning opportunities for beginners and advanced planned giving experts in addition to a Plenary speaker and a Keynote presentation.

HEIDI STRASSBURGER MASTERS PROGRAM

The Northern California Planned Giving Council's annual masters program is named in honor of Heidi Strassburger, a long-time member and past president of our Council who passed away prematurely in 2008. Heidi was dedicated to planned charitable giving and was a talented and tireless friend and mentor to many members of the Council. In honor of her dedication to, and expertise in, the field of charitable gift planning and her leadership and service to the Northern California Planned Giving Council, the Board of Directors named the annual Masters Program the "Heidi Strassburger Masters Program" (HSMP). The HSMP is intended for those who have worked in the field of planned giving for five years or more, although everyone is welcome to attend.

BASICS COURSE

The Planned Giving Basics Course is a six-part, 15-hour introductory course that teaches the basics of planned giving (also known as legacy giving) and features instruction from some of the most experienced planned giving practitioners in the Bay Area. Each 2.5 hour session is interactively presented online via Zoom. While we are operating in a virtual world, opportunities to ask questions, have discussions, and become acquainted and network with fellow attendees will be made available for the best possible experience.

LUNCHEON AND PLANNING IN PRACTICE (PIP) PROGRAMS

Luncheon and Planning in Practice (PIP) programs are educational programs held either virtually or in-person. We invite seasoned speakers to address a wide variety of topics affecting charitable gift planners for everyone at all levels in the field of planned giving.

BENEFITS OF SPONSORSHIP

Conference Sponsorship Benefits

PREMIER \$8,500 (Only 1 available)

- Exclusive billing as “In association with...” in conference marketing (emails and website) and on large signage in Sponsor Hall and Luncheon room
- Placement of company logo on name badges
- Welcoming remarks at the Keynote Luncheon
- Draped table in the Sponsor / Refreshment room (first choice on placement)
- Rolling credits during the Plenary and Luncheon Programs on large screen. Size is commensurate with sponsorship level
- Complimentary registration for 5 company representatives
- Two reserved tables at Keynote Luncheon near center stage (exact placement by choice of sponsor)
- Introduce one workshop session speaker of choice

Plus Suite of Benefits (listed below).

PLATINUM \$7,000 (Only 2 available)

- Sponsor one of the following:
 - Plenary or Scholarships
- Introduce Plenary Speaker or 10 Scholarship recipients
- Draped table in the Sponsor / Refreshment room (placement commensurate with sponsor level)
- Rolling credits during the Plenary and Luncheon Programs on large screen. Size is commensurate with sponsorship level
- Complimentary registration for 3 company representatives
- One reserved table at Keynote luncheon near center stage
- Introduce one workshop session speaker

Plus Suite of Benefits (listed below).

GOLD \$5,500 (Only 3 available)

- Sponsor one of the following:
 - Breakfast (signage in Sponsor Hall)
 - Wi-Fi (signage in Sponsor Hall)
 - Wine Reception (signage in Sponsor Hall)
- Draped table in the Sponsor / Refreshment room (placement commensurate with sponsor level)
- Rolling credits during the Plenary and Luncheon Programs on large screen.

Size is commensurate with sponsorship level

- Complimentary registration for 2 company representatives
- One reserved table at Keynote Luncheon
- Introduce one workshop session speaker

Plus Suite of Benefits (listed below).

SILVER \$3,500 (Only 10 available)

- Draped table in the Sponsor / Refreshment room (placement commensurate with sponsor level)
- Rolling credits during the Plenary and Luncheon Programs on large screen.
Size is commensurate with sponsorship level

- Complimentary registration for 2 company representatives
- Introduce one workshop session speaker (depending on availability and on a first come first served basis)

Plus Suite of Benefits (listed below).

BRONZE \$2,000 (Multiple available)

- Complimentary registration for 2 company representative

Plus Suite of Benefits (listed below).

SUITE OF BENEFITS

- Recognized with logo in all conference marketing:
 - o Email
 - o Website
 - o Signage in Sponsor Hall and Ballroom. Size and placement of logos are commensurate with sponsorship level
- Additional conference registrations are available at the regular registration rates.
 - o Rolling credits on big screen at Plenary and Keynote Luncheon:
 - o Premier Sponsor's logo is alone on a page;
 - o Platinum Sponsors are both on a page;
 - o Gold Sponsors are all three on a page;
 - o Silver Sponsors are all on one page.

Other Programs Sponsorship Benefits

LUNCHEON PROGRAMS (4)

- Logo on website marketing and registration page
- Logo on all email announcements about the program
- 3 minute sponsor presentation
- Introduce Speaker
- 1 complimentary registration

HEIDI STRASSBURGER MASTERS PROGRAM

- Logo on website marketing and registration page
- Logo on all email announcements about the program
- 5 minute sponsor presentation
- Introduce Speaker
- 1 complimentary registration

BASICS COURSE

Primary Sponsor (1 Available)

- Logo on website marketing and registration page
- Logo on all email announcements about the program
- 5 minute sponsor presentation at sessions 1 and 6
- Introduce faculty at sessions 1 and 6.
- 2 complimentary registrations (can be used for sponsor, sponsor can gift it to someone, or sponsor can donate back to NCPGC to provide a scholarship, value \$430)

Supporting Sponsor (4 Available)

- Logo on website marketing and registration page (smaller than Primary Sponsor)
- Logo on all email announcements about the program (smaller than Primary Sponsor)
- 5 minute sponsor presentation at session 2, 3, 4, or 5
- Introduce faculty at Session 2, 3, 4, or 5
- 1 complimentary registration (can be used for sponsor, sponsor can gift it to someone, or sponsor can donate back to NCPGC to provide a scholarship, value \$215)

PLANNING IN PRACTICE PROGRAMS (2)

- Logo on website marketing and registration page
- Logo on all email announcements about the program
- 3 minute sponsor presentation
- Introduce Speaker
- 1 complimentary registration



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THE NORTHERN CALIFORNIA PLANNED GIVING COUNCIL

COMMITMENT FORM

Please complete and return this form to info@ncpgcouncil.org.

SPONSOR INFORMATION

Sponsor Name: (exactly as you want it to appear)					
Billing Contact Name & Email:					
Marketing Material Contact Name & Email:					
Sponsor Address:					
City		State		Zip	
Phone					

SPONSORSHIP LEVELS

Please select all that apply. Please note that Sponsorships are on a first-come, first-served basis.

<p>30th Annual Planned Giving Conference (In-Person)</p> <p><input type="checkbox"/> \$8,500 Premier Sponsor (one available)</p> <p><input type="checkbox"/> \$7,000 Platinum Sponsor (two available) (Please select one) ___ Scholarships ___ Plenary</p> <p><input type="checkbox"/> \$5,500 Gold Sponsor (three available)</p> <p><input type="checkbox"/> \$3,500 Silver Sponsor (ten available)</p> <p><input type="checkbox"/> \$2,000 Bronze Sponsor (multiple available)</p> <p>Luncheon Programs (4)</p> <p><input type="checkbox"/> \$1,000 January 19, 2023 (In Person)</p> <p><input type="checkbox"/> \$500 March 16, 2023 (Virtual)</p> <p><input type="checkbox"/> \$500 September 21, 2023 (Virtual)</p> <p><input type="checkbox"/> \$1,000 November 16, 2023 (In Person)</p> <p>Heidi Strassburger Masters Program</p> <p><input type="checkbox"/> \$1,000 July 20, 2023 (Tentatively in-person) (1 Available) OR (PENDING)</p> <p><input type="checkbox"/> \$750 July 20, 2023 (Virtual) (1 Available)</p>	<p>Basics Course</p> <p><input type="checkbox"/> \$1,500 Primary Sponsor (1 Available)</p> <p><input type="checkbox"/> \$750 Supporting Sponsor (4 Available)</p> <p>Planning in Practice Programs (2)</p> <p><input type="checkbox"/> \$750 January 19, 2023</p> <p><input type="checkbox"/> \$750 November 16, 2023</p>
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COMMITMENT FORM

Please complete and return this form to info@ncpgcouncil.org.

Company Logo:

Your Company Logo will be used as provided in the Suite of Benefits.

Please email your logo (Minimum 300 DPI JPG format) to us at info@ncpgcouncil.org.

Payment:

You will be invoiced for your sponsorship, if you would like to pay by credit card, please complete the credit card authorization form below.

We require payment of the sponsorship within 4 weeks of the invoice date.

Sponsor benefits begin when your payment is received and will continue through the day of the event.

If paying by credit card, please complete the information below:

I, _____ authorize Northern California Planned Giving Council to charge my credit card or debit card for the amount of \$_____.	
Name/ Co. Name:	_____
Billing Address:	_____ _____
Credit Card Type:	<input type="checkbox"/> Visa <input type="checkbox"/> MasterCard <input type="checkbox"/> American Express <input type="checkbox"/> Discover
Cardholder Name:	_____
Credit Card Number:	_____
Expiration Date:	_____ Credit Card Security Code: _____ Billing Zip Code: _____
I certify that I am an authorized user of this credit card or debit card and will not dispute these scheduled transactions with my bank or credit card company; so long as the transactions correspond to the terms indicated in this authorization form.	
SIGNATURE _____	DATE _____
NAME _____	

Once we have processed your charge, you will receive a receipt by email and the information on this form will be destroyed.

Thank you for supporting the Northern California Planned Giving Council!

NORTHERN CALIFORNIA PLANNED GIVING COUNCIL

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