

2024-2025



CORPORATE SPONSORSHIP OPPORTUNITIES

**Securing the wealth of
Boston for years to come**

Sponsorship Sign-up Deadline:
August 23, 2024



DEAR INTERESTED SPONSOR,

Thank you for your interest in sponsoring the Boston Estate Planning Council (BEPC), one of the oldest and largest associations of our kind in the country. Sponsoring BEPC provides your company access to more than 700 estate planning and wealth management professionals in greater Boston from August 2024 through July 2025.

New in 2024-2025, **BEPC now offers four levels for our annual corporate sponsorship packages:**

- **Diamond:** 1 Available
- **Platinum:** 2 Available
- **Gold:** Up to 16 Available
- **Silver:** Unlimited

Each level provides a variety of opportunities to connect with our members and the larger estate planning community. Annual corporate sponsors also have the option to add on hole and item sponsorships for the Council's July 2025 golf outing.

BEPC serves as a thought leader and remains committed to providing the estate planning community, both members and sponsors alike, the tools, information, and connections to navigate estate planning and wealth management challenges. In recent years, BEPC launched programs and efforts to reach beyond practitioners, including work to

inform and educate legislators on issues of import to the profession and to develop financial literacy skills for locally incarcerated populations. The Council strives to evolve to better serve its members, sponsors, and to help them serve their clients and the new face of wealth.

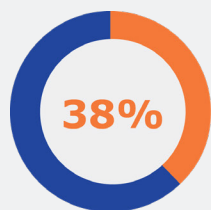
As a BEPC corporate sponsor, your firm will be exposed to our large interdisciplinary membership, as well as to all visitors to the BEPC website and to non-members attending our events. Your brand will be displayed prominently at our events with opportunities for enhanced visibility available at the diamond and platinum sponsorship levels.

Interested in learning more about sponsorship and elevating your brand within the estate planning and wealth management community? Contact our team at sponsorship@bepc.org.

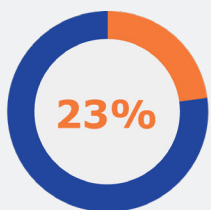
Sponsorship Committee Leadership: Tim King, Co-Chair; Christian Stone, Co-Chair; Karen McKenna, Vice Chair; Nicole Jackson Leslie, Board Liaison

BEPC AT A GLANCE

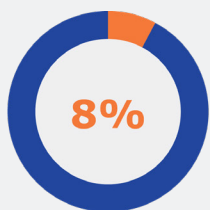
The Boston Estate Planning Council is made up of a diverse group of estate planning professionals in the Boston area. Below is a snapshot of the disciplines that our membership represents.



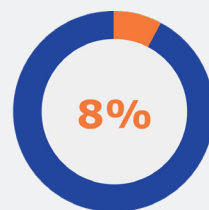
Wealth Management



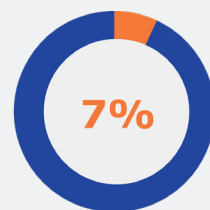
Trust & Estate Law



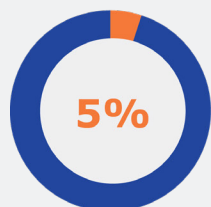
Financial Planning



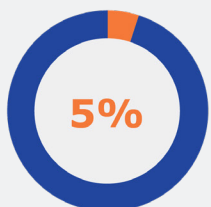
Accounting



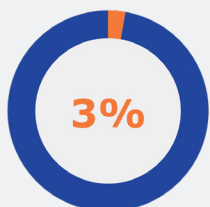
Life Insurance



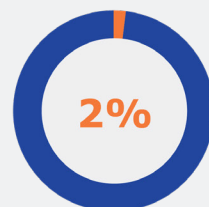
Trust Administration



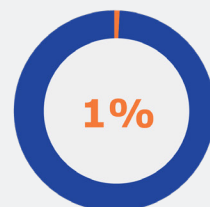
Supporting Consultants



Emeritus



Family Office Management



Planned Giving

BEPC events, both in-person, and virtual, are well attended throughout the year. Attendance numbers are reflective of the high level of engagement among our members.

Roundtables

75-100 PEOPLE

Networking Events

10-200 PEOPLE

Educational Seminars & Webinars

75-100 PEOPLE

CORPORATE SPONSOR BENEFITS

DIAMOND
\$15,000

PLATINUM
\$10,000

GOLD
\$7,500

SILVER
\$3,500

VISIBILITY

Logo and link on the BEPC homepage until July 31, 2025



Logo and link rotating on lower banner of the BEPC homepage until July 31, 2025



Logo and link on dedicated Sponsor page on BEPC website July 31, 2025



Name and link on dedicated Sponsor page on BEPC website July 31, 2025



MEMBER COMMUNICATIONS

Logo and link on all event communications



Name and link on all event communications



Provide one webinar per sponsorship year to BEPC members*. Name and logo on email marketing for webinar. (*Topic must be industry-related and content cannot be solely about the sponsoring organization and/or its products or services. Content must be approved by the Seminars/ Webinars Committee Chair(s).)



Provide an email blast or mailing to BEPC members per sponsorship year. (Coordination through BEPC; list not to be provided to sponsor. Content must follow the guidelines set forth by the Sponsorship Committee.)

2 blasts

1 blast

1 blast

Featured post on BEPC's members only LinkedIn group and members only online community (Feed) per sponsorship year. Post may include photos or videos. (Coordination through BEPC.)

2 posts

1 post

1 post

Logo and link featured in the Beacon, BEPC's monthly newsletter



Opportunity for feature job posting in newsletter



\$250 add on

\$250 add on

Opportunity to provided materials or books to BEPC's financial literacy program participants



PUBLIC RELATIONS

Inclusion in BEPC-issued press release announcing corporate sponsors



CORPORATE SPONSOR BENEFITS

DIAMOND	PLATINUM	GOLD	SILVER
\$15,000	\$10,000	\$7,500	\$3,500

PROGRAMS AND NETWORKING EVENTS VISIBILITY

Logo on general event signage at all BEPC seminars, roundtables, networking Events, webinars, and golf outing. Similar visibility for events delivered in a virtual format.



Name on general event signage at all BEPC seminars, roundtables, networking events, webinars, and golf outing. Similar visibility for events delivered in a virtual format.



An opportunity to address attendees briefly at the start of BEPC seminars, roundtables, networking events, webinars, and golf outing. Sponsors assigned to speak at virtual events receive additional visibility with dedicated slide at the event. (Coordination and assignment of events at BEPC's discretion.)

5 Events

3 Events

2 Events

ADDITIONAL BENEFITS

Complimentary tickets to BEPC Seminars & Webinars, Round Tables, and Networking Events

Non-members from a sponsoring firm may attend members-only events with the sponsor's complimentary event tickets. Members-only events include roundtables, kick-off networking event, Heckerling Institute networking reception, and holiday networking event. Complimentary tickets apply to listed events delivered in a virtual format.

5 per
Eligible
Event

3 per
Eligible
Event

2 per
Eligible
Event

1 per
Eligible
Event

Use of BEPC Sponsor Logo



Attendees at BEPC seminars, roundtables, networking events, and golf outing from the sponsoring firm identified as a sponsor on their name badge. Attendees at virtual events authorized to identify themselves as sponsors with their on-screen name.



Invitation to the exclusive Leadership Reception preceding the BEPC Annual Gala*

(*Paid registration to Annual Gala required.)

5 invites

3 invites

2 invites

2025 GOLF OUTING SPONSORSHIP ADD-ONS

- Corporate sponsors at all sponsor levels have an opportunity to add a hole or item sponsorship to their benefits. Add-on sponsorships are \$350 each. Held in July each year, the Golf Outing features a tournament, additional clinics and activities, and a networking reception to end the day.
- Hole and item sponsorships include your firm's logo and name. Secure an add-on sponsorship for the July 2025 outing by June 30, 2025.



Corporate sponsorships are annual and will include visibility at the events outlined in the prospectus, as well as through a variety of communications channels.

As a BEPC corporate sponsor, your firm will be exposed to our large and growing membership, as well as all visitors to the BEPC website. Additionally, we display your brand prominently at our events with enhanced visibility.

This sponsorship period is valid August 1, 2024 to July 31, 2025.

SPONSORSHIP LEVELS

- Diamond: \$15,000
- Platinum: \$10,000
- Gold: \$7,500
- Silver: \$3,500

SPONSOR FIRMS WITH FIVE (5) OR MORE BEPC MEMBERS WILL ALSO RECEIVE:

- 10% discount on all individual BEPC memberships (\$350 BEPC membership annual fee is reduced to \$315 for all BEPC members of your firm).
- "Concierge" streamlined registration for all BEPC events.
- Non-BEPC members of your firm who attend eligible events as guests will pay the BEPC member rate.

All sponsorship agreements and invoices are managed online. A link to the registration form will be issued once sponsors commit. The form allows you to upload your logo and verify sponsor details. Payment may be made online with a credit card or via check. All payments are due no later than January 31, 2025.

Boston Estate Planning Council
4 Lan Drive, Suite 100
Westford, MA 01886
bepc@bepc.org | www.bepc.org

QUESTIONS?

Contact our team at
sponsorship@bepc.org or **978-364-5170**

SPONSORSHIP TERMS & CONDITIONS

The following terms apply to and are part of the contract between the sponsor ("Sponsor") and the Boston Estate Planning Council ("BEPC") for the 2024-2025 Annual Corporate Sponsorship Program.

Sales and materials are due by August 23, 2024. All payments are due in full by January 31, 2025.

Sponsorships cannot be shared.

Due to the nature of sponsorships and the benefits received, cancellations are not accepted. No refunds will be provided and full payment is required.

BEPC, its agents, and employees will not be liable for failure to hold any events as scheduled. If any event is relocated, delayed, or converted to a virtual format by BEPC, all reasonable efforts will be made to accommodate sponsors in the revised location, dates, and/or format, solely at BEPC's discretion.

