



B O S T O N
ESTATE PLANNING COUNCIL

Corporate Sponsorship Opportunities 2026–2027

Cultivating Excellence for Estate Planning Professionals

**Sponsorship Sign-up Deadline:
August 21, 2026**

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 2026 through July 2027.

BEPC 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 a hole or item sponsorship for the Council's July 2027 golf outing.

BEPC serves as a community of dynamic, diverse, and collaborative professionals dedicated to advancing the field of estate planning through fostering connections within the Council, educational programming and professional development for every stage of one's career, thought leadership to promote subject matter expertise, and meaningful service and collaborative partnerships.

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 women and 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.

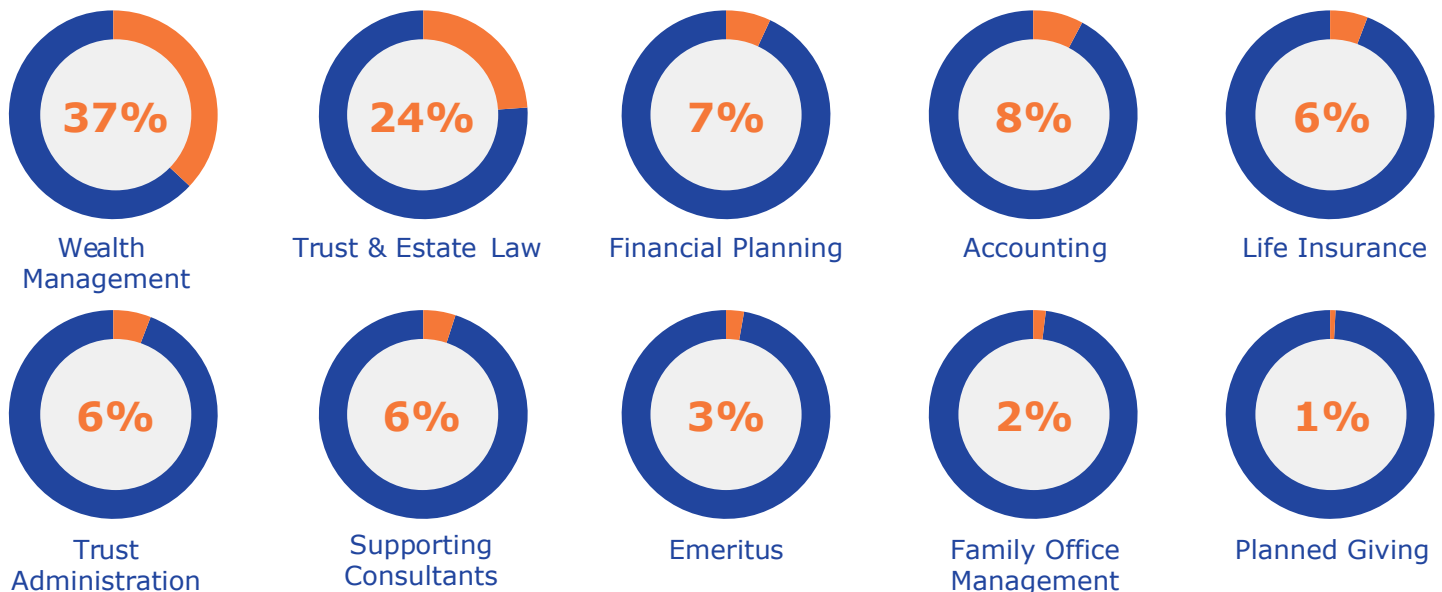
As a BEPC corporate sponsor, your firm will be exposed to our large interdisciplinary membership, as well as to all visitors to the BEPC website and to event attendees. Your brand will be displayed prominently at our events with opportunities for enhanced visibility available at the diamond and platinum 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@bepec.org.

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.



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 25-200 PEOPLE	Seminars & Webinars 50-100 PEOPLE
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2026–2027 ANNUAL CORPORATE SPONSOR BENEFITS	DIAMOND	PLATINUM	GOLD	SILVER
	1 AVAILABLE	2 AVAILABLE	UP TO 16 AVAILABLE	UNLIMITED
	\$15,000	\$10,000	\$7,500	\$3,500
VISIBILITY				
Logo and link on the BEPC homepage until July 31, 2027.	✓			
Logo and link rotating on lower banner of the BEPC homepage until July 31, 2027.		✓	✓	
Logo and link on dedicated BEPC sponsor webpage until July 31, 2027.	✓	✓	✓	
Name and link on dedicated BEPC sponsor webpage until July 31, 2027.				✓
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 with firm's name and logo on email marketing for webinar.* <i>*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).</i>	✓			
Provide an email blast or mailing to BEPC members per sponsorship year. <i>(Coordination through BEPC; list not to be provided to sponsor. Content must follow the guidelines set forth by the Sponsorship Committee.)</i>	2 blasts	1 blast	1 blast	

2026–2027 ANNUAL CORPORATE SPONSOR BENEFITS	DIAMOND	PLATINUM	GOLD	SILVER
	1 AVAILABLE	2 AVAILABLE	UP TO 16 AVAILABLE	UNLIMITED
	\$15,000	\$10,000	\$7,500	\$3,500

MEMBER COMMUNICATIONS (CONTINUED)

Featured post on BEPC's members only LinkedIn group and members only online community (Feed) per sponsorship year. Post may include photos or videos. <i>(Coordination through BEPC.)</i>	2 posts	1 post	1 post	
Logo and link featured in the Beacon, BEPC's monthly newsletter.	✓			
Featured job posting in monthly newsletter.	✓	\$250 add on	\$250 add on	

PUBLIC RELATIONS

Inclusion in BEPC-issued press release announcing corporate sponsors.	✓	✓	✓	✓
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PROGRAMS AND NETWORKING EVENTS VISIBILITY

Logo on general event signage at all BEPC seminars, roundtables, networking events, and summer invitational. Similar visibility for events delivered in a virtual format.	✓	✓	✓	
Name on general event signage at all BEPC seminars, roundtables, networking events, and summer invitational. 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 summer invitational. Sponsors assigned to speak at virtual events receive additional visibility with dedicated slide at the event. <i>(Coordination and assignment of events at BEPC's discretion.)</i>	5 events	3 events	2 events	

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	\$15,000	\$10,000	\$7,500	\$3,500
ADDITIONAL BENEFITS				
Complimentary tickets to BEPC seminars, webinars, roundtables, and networking events. <i>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.</i>	5/eligible event	3/eligible event	2/eligible event	1/eligible event
Use of BEPC sponsor logo/icon.	✓	✓	✓	✓
Attendees at BEPC seminars, roundtables, networking events, and summer invitational 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* <i>(*Paid registration to Annual Gala required.)</i>	5 invites	3 invites	2 invites	

2027 SUMMER INVITATIONAL 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 summer invitational 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/or name. Secure an add-on sponsorship for the July 2027 event by June 30, 2027.

SECURE YOUR SPOT EARLY: 2027 ANNUAL GALA SPONSORSHIPS *NOW AVAILABLE FOR PRE-SALE*

We're excited to offer our valued business partners the exclusive opportunity to lock in sponsorships for BEPC's 2027 Annual Gala ahead of the general release. While our full suite of 2027 sponsorship opportunities will be unveiled in early 2027, a select number of premier gala sponsorships are available now for pre-sale.

By reserving your sponsorship early, you'll ensure maximum visibility and alignment with one of the most anticipated events of the year. These pre-sale opportunities are limited and available on a first-come, first-served basis.

2027 BEPC ANNUAL GALA SPONSORSHIP ADD-ON

- **Leadership Reception Sponsorship:** \$10,000
- **After Party Lounge Sponsorship:** \$10,000
- **Rideshare Sponsorship:** \$7,500
- **Centerpiece Sponsorship:** \$7,500
- **Recovery Kit Sponsorship:** \$7,500
- **Event Patron:** \$5,000
- **Badge Sponsorship:** \$4,000
- **Coat & Bag Check Sponsorship:** \$3,500
- **Walk of Fame Sponsorship:** \$3,000
- **Event Contributor:** \$2,750

Additional sponsorships will be available in early 2027. Gala sponsorships are available until April 30, 2027.

Don't miss your chance to make a lasting impact—secure your 2027 gala sponsorship today.

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 2026–2027 Annual Corporate Sponsorship Program.

Sales and materials are due by August 21, 2026. All payments are due in full by January 31, 2027.

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.

DETAILS

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, 2026 to July 31, 2027.

SPONSORSHIP LEVELS

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

2027 SUMMER INVITATIONAL SPONSORSHIP ADD-ON

- **Hole Sponsorship:** \$350
- **Item Sponsorship:** \$350

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.

Register online [here](#). 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, 2027.

Boston Estate Planning Council
85 Swanson Road, Suite 135
Boxborough, MA 01719
www.bepc.org

QUESTIONS?

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

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