



Dear Colleague:

We are pleased to invite you and your colleagues to join us as a sponsor at the 2017 Western Regional Planned Giving Conference (WRPGC). The conference dates are May 31-June 2 and will be held at the beautiful Westin South Coast Plaza in Costa Mesa, CA. As in past years, the conference will be hosted by the Greater Los Angeles Chapter of the Partnership for Philanthropic Planning (PPP-LA).

Regarded as one of the premier planned giving conferences in the country, it is attended by over 300 non-profit and estate planning professionals throughout the West Coast. Sponsors and attendees enjoy numerous opportunities throughout the 3-day gathering to interact in a dynamic and energetic atmosphere that encourages great conversations and numerous networking opportunities.

Juan Ros, a past WRPGC Co-Chair and former president of PPP-LA who is now with Lamia Financial Group, a long-time sponsor, writes: "I have been attending the Western Regional since 2003 and am proud to have chaired the conference in 2006. This is the one conference I never miss! Whether you are with a non-profit or you are a for-profit professional working in philanthropy, no conference is better organized, with better speakers and better networking, than Western Regional!"

Enclosed is the sponsorship prospectus and a list of benefits for your review. Please join us in supporting the tradition of the WRPGC in this, our 26th year. We are grateful for your interest in sponsoring and look forward to speaking with you in the coming weeks.

Please contact our Sponsorship Co-Chairs, Ray Watts & Jim Jacobs, if you have questions or need any additional information.

Ray Watts  
Sponsorship Co-Chair  
[ray\\_watts@redlands.edu](mailto:ray_watts@redlands.edu)

Jim Jacobs  
Sponsorship Co-Chair  
[jjacobs@cmc.edu](mailto:jjacobs@cmc.edu)

Also, many of our sponsorship opportunities involve collaborating with our planning committee and the conference speakers so we look forward to working with you to offer what we know will be another terrific conference.

We look forward to having you join us as one of our conference sponsors in Costa Mesa this Spring!

Sincerely,

Ray Rotolo  
Conference Co-Chair  
[rrotolo@cmc.edu](mailto:rrotolo@cmc.edu)

Patience Boudreaux  
Conference Co-Chair  
[patience\\_boudreaux@redlands.edu](mailto:patience_boudreaux@redlands.edu)



**EXPLORING THE FUTURE  
OF GIFT PLANNING**

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2017 WESTERN REGIONAL  
PLANNED GIVING CONFERENCE

***MAY 31 - JUNE 2, 2017***  
**WESTIN SOUTH COAST PLAZA**

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In 2017, an influential group of planned giving professionals will gather at the Westin South Coast Plaza Hotel in Costa Mesa, California, as the Partnership for Philanthropic Planning of Greater Los Angeles holds its 26th Annual Western Regional Planned Giving Conference. One of the largest planned giving gatherings in the country, this exclusive event of more than 300 non-profit gift planners and other allied professionals is a one-of-a-kind opportunity for your organization or company to connect with and receive the undivided attention of key decision makers and gift planning leaders across Southern California and the western United States.

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***JOIN US! THIS IS YOUR OPPORTUNITY TO BE ONE OF THE LIMITED NUMBER OF SPONSORS AT THIS  
HIGHLY ANTICIPATED ANNUAL EVENT, CONSIDERED TO BE ONE OF THE FINEST CONFERENCES IN THE COUNTRY!***

## **ABOUT PPP-LA**

Founded in 1980 and formerly known as the Planned Giving Roundtable of Southern California, The Partnership for Philanthropic Planning of Greater Los Angeles (PPP-LA) is the oldest association of planned giving professionals in the greater Los Angeles area. PPP-LA, a member council of the National Association of Charitable Gift Planners, (formerly the Partnership for Philanthropic Planning), is a community dedicated to increasing philanthropy through charitable gift planning. As one of the largest and most dynamic planned giving councils in the country, PPP-LA offers its members opportunities for improving their technical skills and professional knowledge while building a valuable network of colleagues in the philanthropic planning community.

PPP-LA serves both non-profit and for-profit allied professionals. Our members include: gift planning officers and directors, development officers and directors, non-profit trustees, staff and volunteers, trust officers, financial planners, accountants, insurance professionals, attorneys, and investment and banking professionals.

## **CONFERENCE CO-CHAIRS**

### **Ray Rotolo**

Senior Director, Planned Giving  
Claremont McKenna College

### **Patience Boudreaux**

Philanthropic Advisor  
University of Redlands

## **ABOUT THE CONFERENCE**

Over the past 26 years, the Western Regional Planned Giving Conference (WRPGC) has earned a well-deserved reputation as one of the most stimulating and worthwhile educational opportunities for gift planning and other allied professionals across California and the western United States.

This year is no exception. The 2017 WRPGC will provide the opportunity to gather with gift planning officers, major gift officers, directors of development, vice presidents, executive directors, and chief development officers from a wide array of organizations. Past attendees hailed from Children's Hospital Los Angeles, University of California, Los Angeles, the Alzheimer's Association, California Community Foundation, Pepperdine University, Stanford University, USC, Union Rescue Mission, The Community Foundation, Braille Institute, and many others, covering a wide spectrum of organizational sizes and missions. Find out firsthand what they need from vendors, and use this opportunity to educate conference attendees on how they can use your products and services.

The Westin South Coast Plaza provides an intimate setting for the conference and its sponsors in an exclusive wing of the hotel's public area. Sponsors are located in the foyer directly outside plenary and breakout sessions for maximum exposure. Many networking opportunities with participants are available — don't miss out!

## **SPONSORSHIP LEVELS**

Patron Sponsor .....	\$10,000
Professional Development Sponsor .....	\$6,000
Event Sponsors .....	\$5,000
Mobile App .....	\$3,500
Breakout Session Sponsor .....	\$2,500
Conference Sponsor .....	\$1,500

## **PARTIAL LIST OF PAST SPONSORS**

American Institute for Philanthropic Studies	Mitchell Silberberg & Knupp LLP
BNY Mellon	Northern Trust
The Breus Group	Paschal Murray, Inc.
Brown & Streza LLP	PG Calc
Chameleon Creative Group	Rodriguez, Horii, Choi & Cafferata LLP
Clifford Swan Investment Counsel	Sharpe Group
The Community Foundation	Temo Arjani LLP
Crescendo Interactive, Inc.	The Stelter Company
Flans & Weiner, Inc.	Union Bank
Freeman Freeman & Smiley, LLP.	U.S. Trust, Philanthropic Services
Graystone Consulting	V. J. Fraumeni Consulting
Kaspick & Company	Wells Fargo Bank,
Lamia Financial Group, Inc.	Philanthropic Services
	Withers Bergman LLP

**TO SECURE A SPONSORSHIP TODAY, PLEASE CONTACT STACEY SCHEIRER, PPP-LA ADMINISTRATOR:**  
PPP-LA • 65 ENTERPRISE, ALISO VIEJO, CA 92656  
PHONE: 949-715-5400 FAX: 949-715-6931 EMAIL: [INFO@PPPLA.ORG](mailto:INFO@PPPLA.ORG)

S P O N S O R S H I P B E N E F I T S

SPONSORSHIP LEVEL							
PATRON		PROF. DEV.		EVENT	MOBILE APP	BREAKOUT SESS.	CONFERENCE
INCLUDED BENEFITS							
	\$10,000	\$6,000	\$5,000	\$3,500	\$2,500	\$1,500	
Exclusive billing as "In association with..." in conference marketing, website and app	Multiple Available	Multiple Available	Multiple Available	One Available	Multiple Available	Multiple Available	
Attendee list complete with address and email	✓						
Welcoming remarks at Plenary Luncheon	✓	✓					
Company logo or name on conference tote bags	Preferred	Prominent					
Preferred seating at Luncheon	✓	✓	✓				
Name or logo on Attendee Name Tags	✓	✓	✓				
Sponsor of Plenary or Luncheon Program		✓					
Introduce Plenary or Luncheon Speaker		✓					
Acknowledgment on Personalized Splash Screen, Featured sponsor on Main Banner, Push Notifications, Area Map Listing and other app features				✓			
Sponsorship of Event:		✓					
Primer Session							
Wednesday Welcome Reception							
Thursday Breakfast							
Thursday Snack Break							
Thursday Cocktail Reception							
Friday Breakfast							
Introduce a workshop session speaker					✓		
Advertisement in conference app	✓	✓	✓	✓	✓	✓	
Recognition in all conference marketing	✓	✓	✓	✓	✓	✓	
Complimentary conference registration(s)	5	3	2	2	2	1	
Exhibit table in East Galleria Foyer (central to all conference activities)	✓	✓	✓	✓	✓	✓	
Rolling credits throughout the Plenary and Luncheon Programs on the "big screen"	✓	✓	✓	✓	✓	✓	
Promotional literature or tokens inside each participant's tote bag	✓	✓	✓	✓	✓	✓	



## EXPLORING THE FUTURE OF GIFT PLANNING

2017 WESTERN REGIONAL  
PLANNED GIVING CONFERENCE

**MAY 31 - JUNE 2, 2017**  
WESTIN SOUTH COAST PLAZA

### Instructions:

Please complete all sections of the application and mail, fax, or email to:

PPP-LA • 65 Enterprise • Aliso Viejo, CA 92656

Phone (949) 715-5400 • Fax (949) 715-6931 • Email [info@pppla.org](mailto:info@pppla.org)

Company: \_\_\_\_\_

Name/Title: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Phone/Email Address: \_\_\_\_\_

**Sponsor Opportunities:** Please check all that apply and calculate your total. **Quantity discounts are available for Professional Development Sessions and Breakout Sessions.** Please take 10% off each additional session. For example: 3 Breakout Sessions would cost \$6,775. \$2,500 for the first session, \$2,250 for the second session (\$2,500 less 10%), and \$2,025 for the third session (\$2,250 less 10%).

	Patron Sponsor	Multiple Available	\$10,000	
	Professional Development Session Sponsor	Multiple Available	\$6,000	
	Event Sponsor: Primer Session	(1 Available)	\$5,000	
	Event Sponsor: Wednesday Welcome Reception	(1 Available)	\$5,000	
	Event Sponsor: Thursday Breakfast	(1 Available)	\$5,000	
	Event Sponsor: Thursday Snack Break	(1 Available)	\$5,000	
	Event Sponsor: Thursday Cocktail Reception	(1 Available)	\$5,000	
	Event Sponsor: Friday, Breakfast	(1 Available)	\$5,000	
	Mobile App Sponsor	(1 Available)	\$3,500	
	Breakout Session Sponsor	Multiple Available	\$2,500	
	Conference Sponsor	Multiple Available	\$1,500	
			<b>TOTAL</b>	<b>\$</b>

### Payment:

#### Deadline: Payment due by Friday, February 17, 2017

Please make check payable to PPP-LA and mail to: PPP-LA, 65 Enterprise, Aliso Viejo, CA 92656.

PPP-LA accepts credit cards. Please complete the information below if paying with credit card.

I am using a: \_\_\_\_\_ Mastercard \_\_\_\_\_ Visa \_\_\_\_\_ American Express

Card Number \_\_\_\_\_ Exp.Date \_\_\_\_\_

Name on Card \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Should you foresee any difficulty in meeting this payment deadline, please contact Jerry Packer at [info@pppla.org](mailto:info@pppla.org) or call 949-715-5400.



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### **Sponsor Advertisement & Description:**

**Deadline: Friday, February 17, 2017 (but you are welcome to get it in sooner!)**

A Conference Guidebook is distributed to every conference registrant, speaker, and sponsor. Every exhibiting sponsor company receives a color 4.75 x 7.25 company ad space and company description space in the Guidebook. Both the ad and the description need to be provided by the sponsor and emailed to [info@pppla.org](mailto:info@pppla.org) with a subject line of SPONSOR AD. Please note in the email message the names of the attached documents and the program in which they were made (Word, Illustrator, Quark, etc.) See other specifications below.

#### **Sponsor Company Ad specifications (text and images/graphics):**

- 4.75 inches x 7.25 inches (4.75 is the width and 7.25 is the height)
- color
- 300 dpi resolution
- saved in one of the acceptable formats: JPG, TIFF, EPS or print quality PDF with outlined fonts.

#### **Sponsor Company Description (text only):**

Please write...

- Your company name exactly how you would like the name of your company listed in the conference materials, and
- A 50-80 word description of your organization and the services you provide.

#### **Sponsor Logos (ONLY applies to Title, Professional Development, Event, or Guidebook)**

If you are a Title, Event, Guidebook or Room Sponsor for the conference, please email...

- a black and white logo, 300 dpi
- a color logo, 300 dpi

The logo files must be saved in one of the high resolution acceptable formats: Vector-based EPS (preferable), JPG, TIFF, or print quality PDF. They will be used for posters and in the Guidebook (on pages separate from your ad and description). Please email them to [info@pppla.org](mailto:info@pppla.org) with a subject of SPONSOR LOGOS and include in the email message the names of the attached documents and the program in which they were made (Word, Illustrator, Quark, etc.)

### **Cancellation Policy:**

Written notification of cancellation received by Monday, March 7, 2017, a refund will be issued minus a \$100 U.S. administrative fee. Written notification of cancellation received by Friday, March 25, 2017, a refund will be issued minus a \$250 U.S. administrative fee. NO REFUNDS WILL BE ISSUED AFTER MARCH 25, 2017.

Should you have any questions regarding your sponsorship, please contact Jerry Packer at [info@pppla.org](mailto:info@pppla.org) or call 949-715-5400.



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### Registration Information:

**Deadline: Friday, April 8, 2017, but you can send it now!**

Please complete the following to confirm your registration information is correctly recorded. If you would like to register additional colleagues or exhibit staff, the fee is \$250.00 per person. A check in the proper amount should be made payable to PPP-LA and mailed to PPP-LA, 65 Enterprise, Aliso Viejo, CA 92656.

Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Company: \_\_\_\_\_  
Address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_  
Phone: \_\_\_\_\_ Fax: \_\_\_\_\_  
Email Address: \_\_\_\_\_

### Additional Registrants

Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Company: \_\_\_\_\_  
Address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_  
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