

Los Angeles Council

of Charitable Gift Planners

# VISION 20/20: THE FUTURE OF FUNDRAISING

# **MAY 27 - MAY 29, 2020**

Westin South Coast Plaza

On May 27 –29, 2020, an influential group of gift planning professionals will once again gather at the Westin South Coast Plaza Hotel in Costa Mesa, CA as the Los Angeles Council of Charitable Gift Planners holds its 29th Annual Western Regional Planned Giving Conference. One of the largest regional planned giving conferences in the country, this annual gathering of more than 300 non-profit gift planners and 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.

We welcome you to 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 LACGP**

For more than 30 years, the Los Angeles Council of Charitable Gift Planners has been promoting philanthropy by educating, connecting and inspiring gift planning professionals throughout Southern California.

Our strength comes from the diversity of our members' professional positions. Whether a planned giving officer, attorney, trust officer, philanthropic advisor, financial advisor, insurance agent, or other professional, LACGP is dedicated to ensuring the best resources for you through education and advocacy.

Join our community of professionals integrated across fields working to assist our donors and clients in the philanthropic journey.

#### Kimberley Valentine

Director, Leadership Gifts Los Angeles Philharmonic Association

#### James A. Jacobs

Associate Director, Planned Giving Claremont McKenna College

### **About the Conference**

Over the past 29 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.

The 2020 WRPGC will provide sponsors the opportunity to gather with a variety of gift planning professionals from a wide array of organizations as well as estate planning attorneys, CPAs, financial advisors, wealth managers, and others who support donors in their philanthropic efforts. Recent participants have come from the following organizations: City of Hope, the California Institute of Technology, the Sierra Club, CHOC Children's Foundation, Pomona College, California State University–Northridge, Los Angeles Philharmonic, University of California, California Island Conservancy, American Heart Association, Los Angeles LGBT Center, American Red Cross, the Huntington Library, Jewish National Fund and many others, covering a wide spectrum of organizational sizes and missions. This is a wonderful opportunity to find out firsthand what they need to support their planned giving programs and to educate conference attendees on how they can use your products and services.

The Westin South Coast Plaza provides an ideal 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 and transition periods are built into the schedule to allow plenty of time for attendees to mingle with sponsors and each other. Many networking opportunities with participants are available — we hope to see you at the 2020 conference.

### **Sponsorship Levels**

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

### **Partial List of Past Sponsors**

Abell Auction Company
American Institute for
Philanthropic Studies
Bank of America
BNY Mellon Wealth Management
Charitable Trust Administration
Clifford Swan
Investment Counselors

Crescendo Interactive
Freeman, Freeman, & Smiley
Karlin & Peebles, LLP
Mitchell Silberberg & Knupp, LLP

Northern Trust
Orange County Community
Foundation
PG Calc
Rodriguez, Horii, Choi, Cafferata

RenSPG State Street Global Advisors

TemoArjani, LLP
The Stelter Company
TIAA-Kaspick
Wells Fargo

Withers Bergman, LLP

## SPONSORSHIP BENEFITS

|  | SPONSORSHIP LEVEL  |                             |                    |               |                    |                    |
|--|--------------------|-----------------------------|--------------------|---------------|--------------------|--------------------|
| Submit the Sponsorship Payment form or pay online at www.lacgp.org   | Patron             | Professional<br>Development | Event              | Mobile App    | Breakout Sessions  | Conference         |
| INCLUDED BENEFITS  |                    |                             |                    |               |                    |                    |
|  | \$10,000           | \$6,000                     | \$5,000            | \$3,500       | \$2,500            | \$1,500            |
|  | Multiple Available | Multiple Available          | Multiple Available | One Available | Multiple Available | Multiple Available |
| Exclusive billing as "In association with" in conference marketing, website and app  | <b>√</b>           |                             |                    |               |                    |                    |
| Attendee list complete with address and email  | ✓                  | ✓                           |                    |               |                    |                    |
| Preferred seating at Luncheon  | ✓                  | ✓                           | ✓                  |               |                    |                    |
| Name or logo on Attendee Name Badges   | ✓                  |                             |                    |               |                    |                    |
| 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 Networking Opportunities*: Wednesday Primer Session, Wednesday Welcome Reception, Thursday Breakfast, Thursday Snack Break, Welcome Remarks Thursday at Cocktail Reception, Friday Breakfast. 'first-come, first-reserved | <b>~</b>           | <b>*</b>                    | <b>~</b>           |               |                    |                    |
| Sponsor a Breakout Session   | ✓                  | ✓                           | ✓                  | ✓             | ✓                  |                    |
| Introduce a Breakout Session speaker   | ✓                  | ✓                           | ✓                  | ✓             | ✓                  |                    |
| Advertisement in conference app  | ✓                  | ✓                           | ✓                  | ✓             | ✓                  | ✓                  |
| Recognition in all conference marketing  | ✓                  | ✓                           | ✓                  | ✓             | ✓                  | ✓                  |
| Complimentary conference registration(s)   | 4                  | 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"   | ✓                  | ✓                           | ✓                  | ✓             | ✓                  | ✓                  |



## Vision 20/20: The Future of Fundraising

## May 27 - May 29, 2020 · Westin South Coast Plaza Sponsorship Registration Form

#### Instructions:

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

| _   |                             |          |    |
|---|-----------------------------|----------|----|
| Company:  |                             |          |    |
| Name/Title:   |                             |          |    |
| Address:  |                             |          |    |
| City/State/Zip:   |                             |          |    |
| Phone/Email Address:  |                             |          |    |
| Sponsor Opportunities: Please check all that apply and calcu  | late your total.            |          |    |
| Patron Sponsor  | Multiple Available          | \$10,000 |    |
| Professional Development Sponsor  | Multiple Available          | \$6,000  |    |
| Event Sponsor   | Multiple Available          | \$5,000  |    |
| Mobile App Sponsor  | (1 Available)               | \$3,500  |    |
| Breakout Session Sponsor  | Multiple Available          | \$2,500  |    |
| Conference Sponsor  | Multiple Available          | \$1,500  |    |
| Additional Registrants See prospectus for number of complimentary conference registrations included with sponsorship level. Add names to next page. | Multiple Available          | \$250    |    |
|   |                             | TOTAL    | \$ |
| Payment: Deadline: Payment due by Friday, March 27, 2020  | ue, Suite 1050, Long Beach, | CA 90802 |    |

Date



# Vision 20/20: The Future of Fundraising

## May 27 – May 29, 2020 • Westin South Coast Plaza Sponsorship Registration Form

#### **Registration Information:**

Deadline: Friday, March 27, 2020, 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 beyond the number of complimentary conference registrations included with sponsorship level. A check in the proper amount should be made payable to "LACGP" and mailed to LACGP, 320 Pine Avenue, Suite 1050, Long Beach, CA 90802.

| Name:                  |        |  |
|------------------------|--------|--|
| Title:                 |        |  |
| Company:               |        |  |
| Address:               |        |  |
| City/State/Zip:        |        |  |
| Phone:                 |        |  |
|                        |        |  |
| Additional Registrants |        |  |
| Name:                  |        |  |
| Title:                 |        |  |
| Company:               |        |  |
| Address:               |        |  |
| City/State/Zip:        |        |  |
| Phone:                 |        |  |
|                        |        |  |
| Name:                  |        |  |
| Title:                 |        |  |
| Company:               |        |  |
| Address:               |        |  |
| City/State/Zip:        |        |  |
| Phone:                 |        |  |
|                        |        |  |
| Name:                  |        |  |
| Title:                 |        |  |
| Company:               |        |  |
| Address:               |        |  |
| City/State/Zip:        |        |  |
| Phone:                 |        |  |
|                        |        |  |
| Name:                  |        |  |
| Title:                 |        |  |
| Company:               |        |  |
| Address:               |        |  |
| City/State/Zip:        |        |  |
| Phone:                 | Fmail: |  |