



ESTATE PLANNING  
COUNCIL OF  
GREATER MIAMI



# 13TH ANNUAL ESTATE PLANNING SYMPOSIUM

SPONSORSHIP OPPORTUNITIES



**FEBRUARY 4, 2025**

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## **About Us**

The Estate Planning Council of Greater Miami is a distinguished organization of professional estate planners dedicated to elevating the standards of estate planning in our community. Since our founding in 1949, we have been committed to fostering public awareness of the critical importance of estate planning, guided by a collaborative team of skilled professionals.

## **Our Mission**

Our mission is to enhance public understanding of estate planning by promoting a multidisciplinary approach. We believe that the best outcomes are achieved when a team of expert advisors—each bringing unique skills and perspectives—works together to serve the public's needs.

## **Who We Are**

Our organization proudly includes members from the six key disciplines in estate planning:

- Accounting
- Financial Planning
- Insurance
- Law
- Planned Giving
- Trust Services

This diverse team approach ensures comprehensive estate planning that meets the highest professional and educational standards.

## **What We Do**

The Estate Planning Council of Greater Miami is the premier local organization for all professionals involved in the estate planning process. We are known for conducting high-quality seminars and meetings designed to educate our members and promote best practices in the industry.

## **Networking and Education**

We provide an active forum for networking with the top practitioners in the field, offering opportunities to exchange ideas, share knowledge, and stay informed about the latest developments in estate planning. Our commitment to continuous education ensures that our members are always at the forefront of the profession, delivering exceptional service to their clients.

# EPC ANNUAL SYMPOSIUM

## About the EPC of Greater Miami Symposium

The Estate Planning Council of Greater Miami Symposium is the premier event for professionals in the estate planning community. Bringing together leaders from the fields of accounting, financial planning, insurance, law, planned giving, and trust services, the symposium offers exceptional opportunities for education, networking, and collaboration.

We are pleased to announce that this year's keynote speaker will be Samuel Donaldson, Interim Associate Dean of Academic Affairs and Professor of Law at Georgia State University. With over 20 years of teaching experience, including 13 years at the University of Washington, Professor Donaldson is a five-time recipient of the Philip A. Trautman Professor of the Year award. He is a nationally recognized speaker on federal taxation and estate planning and co-author of several authoritative texts, including *Federal Income Tax: A Contemporary Approach* and *Contemporary Estate Planning*. An Academic Fellow of the American College of Trust and Estate Counsel (ACTEC), he is also a published crossword constructor with work appearing in *The New York Times*, *The Washington Post*, and *The Wall Street Journal*.

His expertise and insights will provide valuable perspectives on key issues in estate planning.



### **Keynote Speaker:**

**Samuel Donaldson**

Interim Associate Dean of Academic  
Affairs and Professor of Law  
Georgia State University

Sponsoring the EPC of Greater Miami Symposium allows you to connect with influential professionals, increase your organization's visibility, and support the growth and advancement of the estate planning field.

# SPONSORSHIP OPPORTUNITIES

## **Platinum Sponsorship: \$5,500**

After January 3, 2025 - \$6,000

- 7-minute presentation to attendees
- Extra-large format display of your logo on the EPC website (until 6/30/2025)
- 6' Sponsor Expo Booth in premier location
- Complimentary registration for three representatives
- Two full pages of advertising in attendees' materials

In addition to the outlined benefits, sponsors will have a reserved luncheon table, their logo displayed at the event, and the opportunity to participate in the raffle. Sponsors will also receive a post-event opt-in attendees list.

## **Gold Sponsorship: \$3,000**

After January 3, 2025 - \$3,500

- 3-minute presentation to attendees
- Large format display of your logo on the EPC website (until 6/30/2025)
- 6' Sponsor Expo Booth in preferred location
- Complimentary registration for two representatives
- One full page of advertising in attendees' materials

# SPONSORSHIP OPPORTUNITIES

## **Silver Sponsorship: \$2,000**

After January 3, 2025 - \$2,500

- 1-minute presentation to attendees
- Medium format display of your logo on the EPC website (until 6/30/2025)
- 6' Sponsor Expo Booth
- Complimentary registration for one representative
- One-half page of advertising in attendees' materials

## **Bronze Sponsorship: \$500**

After January 3, 2025 - \$1,000

- Small format display of your logo on the EPC website (until 6/30/2025)
- 50% off registration for one representative
- One quarter page of advertising in attendees' materials

## **Join Us as a Sponsor!**

For more information, please contact us!

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