



21ST ANNUAL JOINT TAX & ESTATE PLANNING SEMINAR

WE'RE BACK IN PERSON!

The Community Foundation of Broward, the Jewish Community Foundation of Broward County and United Way of Broward County joined forces 21 years ago to hold a Joint Tax and Estate Seminar for professional advisors in Broward County.

Attendance at the Seminar has significantly grown over the years from below 100 at the first Seminar, to 400+ the past several years. We will be offering our very popular networking breakfast prior to the Seminar, which is heavily attended. The Joint Tax & Estate Planning Seminar increases in reputation each year building on a tradition of cutting-edge presentations by nationally recognized speakers, superior educational experiences, and prime networking opportunities. We understand that we are in uncertain times and will be implementing COVID-19 protocols as recommended by Broward County and the Centers for Disease Control and Prevention. Please visit our website for updates.

Attorneys, Certified Public Accountants, Investment Consultants, Financial Advisors/Wealth Managers, Insurance Agents and Certified Financial Planner professionals eagerly await this Seminar each year. The Seminar also offers continuing education credit in multiple disciplines.

This year's Seminar will be held on Wednesday, December 7, 2022. Our featured speaker this year is **Christopher Hoyt, Professor, University of Missouri (Kansas City) School of Law**, and the topic is: **Retirement Accounts: Planning Optimal Family and Charitable Outcomes.**

We invite you to become a sponsor for the 2022 program. Sponsorship of this high profile event provides your firm the opportunity to align and engage with three of Broward County's most respected and well-established organizations: Community Foundation of Broward, Jewish Community Foundation of Broward County and United Way of Broward County.

Charitable Partners:

Community Foundation of Broward:

Mark Kotler: mkotler@cfbroward.org or (954) 761-9503

Jewish Community Foundation of Broward County:

Sydney Gorodetsky Rubin: srubin@JewishBroward.org or (954) 252-6886

United Way of Broward County:

Ana Sosa: asosa@unitedwaybroward.org or 954-851-4366.



Presenting Organizations



21ST ANNUAL
JOINT TAX &
ESTATE PLANNING
SEMINAR

jointtaxandestate.com

CO-CHAIRS

Tanya Bower, Esq.
Tripp Scott, P.A.
Representing:
Community Foundation of Broward

David S. Appel, CPA*, PFS
Marcum, LLP
Representing:
Jewish Community Foundation of Broward County

Carole Enisman
Premier Wealth Planning
Representing:
United Way of Broward County

SPONSOR OPPORTUNITIES

Celebrating 21 years, this year's Seminar will provide even greater sponsor benefits and builds on a tradition of cutting-edge presentations by nationally recognized speakers, superior educational experiences, and prime networking opportunities. Do not miss this opportunity to highlight your organization at South Florida's premier Tax and Estate Planning event!

WHO WILL ATTEND

- ✓ Attorneys
- ✓ Certified Public Accountants
- ✓ Investment Consultants
- ✓ Financial Advisors / Wealth Managers
- ✓ Insurance agents
- ✓ Certified Financial Planner™ Professionals

Nova Southeastern University
Rose and Alfred Miniaci Performing Arts Center

DATE:
Wednesday, December 7, 2022

SPEAKER:
Christopher Hoyt, JD
Professor, University of Missouri (Kansas City) School of Law

TOPIC:
Retirement Accounts:
Planning Optimal Family and Charitable Outcomes

2022 SEMINAR SPONSORSHIP OPPORTUNITIES

PLATINUM SPONSOR (\$10,000) – Limit 3 (non-competing companies)

- Signage with Company Name & Logo at the Networking Breakfast
- Announcement recognizing sponsor at beginning of Seminar
- Custom video presentation from onstage & website
- Full page 4 color ad on back cover, or inside covers of attendee manual
- Prominent name recognition on home page of website
- Advertising/ Logo on all collateral including save the date postcard, invitations and e-vites
- Link to your company website on the 21st Annual Joint Tax & Estate Planning Seminar website
- 40 tickets for the Seminar
- Exhibit table at networking breakfast
- Attendee contact list for Seminar

GOLD SPONSOR (\$5,000) – Limit 3 (non-competing companies)

- Premium placement of full page 4 color ad
- Prominent name recognition on home page of website
- Advertising/ Logo on all collateral including save the date postcard, invitations and e-vites
- Link to your company website on the 21st Annual Joint Tax & Estate Planning Seminar website
- 30 tickets for the Seminar
- Exhibit table at networking breakfast
- Onstage recognition as Gold sponsor and custom video presentation from onstage & website
- Attendee contact list for Seminar

SILVER SPONSOR (\$2,500)

- Full page black & white ad in attendee manual
- Logo/name recognition on all collateral including save the date postcard, invitations and e-vites
- Link to your company website on the 21st Annual Joint Seminar website
- 20 tickets for the Seminar
- Onstage recognition as sponsor
- Attendee contact list for Seminar

BRONZE SPONSOR (\$1,000)

- Half-page black & white ad in attendee manual
- Name recognition on all collateral including save the date postcard, invitations and e-vites
- Link to your company website on the 21st Annual Joint Seminar website
- 15 tickets for the Seminar
- Acknowledgement in program slide show

PATRON SPONSOR (\$500)

- Quarter-page black & white ad in attendee manual
- 10 tickets for the Seminar
- Acknowledgement in program slide show

NON PROFIT SPONSOR (\$250)

- Business card ad (blk/wh) in attendee manual
- 4 tickets for the Seminar

INDIVIDUAL SPONSOR (\$250)

- Name and Company name on "Thank You" page in attendee manual
- 2 tickets for the Seminar

SPONSOR REGISTRATION FORM

Please Check One:

- | | |
|--|---|
| <input type="checkbox"/> \$10,000 Platinum Sponsor | <input type="checkbox"/> \$500 Patron Sponsor |
| <input type="checkbox"/> \$5,000 Gold Sponsor | <input type="checkbox"/> \$250 Non Profit Sponsor |
| <input type="checkbox"/> \$2,500 Silver Sponsor | <input type="checkbox"/> \$250 Individual Sponsor |
| <input type="checkbox"/> \$1,000 Bronze Sponsor | |

Name of sponsoring organization: *(This is how it will appear in the program.)*

Sponsor Contact: (Name, title) _____

Address: _____

City, State, Zip: _____

Telephone: _____ Fax: _____

E-Mail: _____

Website: _____

Method of Payment:

Check Enclosed

Please make checks payable to:

Jewish Federation of Broward County

(for our bookkeeping purposes, please put "Jewish Community Foundation/Joint Tax Seminar" in the memo section)

Credit Card Information:

AMEX MasterCard Visa Discover

Card No.: _____ Expiration Date: _____

Signature: _____ Date: _____

Make checks payable to and/or send charge card information to:

Jewish Federation of Broward County

5890 South Pine Island Road, Davie, FL 33328

(for our bookkeeping purposes, please put "Jewish Community Foundation/Joint Tax Seminar" in the memo section)

For additional Sponsorship information please reach out to info@jointtaxandestate.com

Please submit your ad electronically to: info@jointtaxandestate.com

Please visit our website for COVID-19 updates

ADVERTISEMENT SPECIFICATIONS

- PDF (preferred) or JPG file (see following page for size and orientation specs)
- 300 DPI (High Resolution), no bleeds, use the specified size as the total image size
- All advertisements are black/white, except Gold & Meet & Mingle Event Sponsor ads which should be in CMYK

Please submit your ad to info@jointtaxandestate.com

Note: All art will be used "as-is."

Sponsorship Deadlines

Sponsorship Confirmation: August 15th, 2022

(Note: In order to be listed on the mailed Save the Date Postcard)

Payment: October 14th, 2022

Artwork: October 31st, 2022

**For additional Sponsorship information please reach out to
info@jointtaxandestate.com**

**Please submit your ad electronically to:
info@jointtaxandestate.com**

Or, call 754.422.1672

On behalf of the
Community Foundation of Broward
Jewish Community Foundation of Broward County
United Way of Broward County

Thank You!

ADVERTISEMENT SPECIFICATIONS

All advertisements must be PDF or JPG

300 DPI (High Resolution)

No bleeds, use the specified Size as Total Image Size

**Patron Sponsor
Quarter Page Ad
3.8" W x 5.05" H
(Black and White)
(Vertical Orientation Only)**

**Platinum Sponsor (Color)
Gold (Color)
Silver (Black and White)
Sponsor Full Page Ad
7.78" W x 10.25" H
(Vertical Orientation Only)
300 dpi (High Resolution)**

**Nonprofit Sponsor
Business Card Ad
3.8" W x 2.5" H
(Black and White)**

**Bronze Sponsor Half Page Ad - 7.78" W x 5.05" H (Black and White)
(Horizontal Orientation Only)**