



22ND ANNUAL

# JOINT TAX & ESTATE PLANNING SEMINAR 2023

[jointtaxandestate.com](http://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

**Sean Riley, CPWA®, CFP®**  
UBS Private Wealth Management  
Representing:  
United Way of Broward County

## SPONSOR OPPORTUNITIES

Celebrating 22 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

### Thursday, November 16, 2023

7:30 A.M. Registration Opens

7:30 A.M.-9:00 A.M. Networking Breakfast

9:00 A.M. - 11:45 A.M. Seminar (Includes Q&A Time)

First Baptist Fort Lauderdale

**SPEAKER:**

**BETH KAUFMAN | PARTNER, LOWENSTEIN SANDLER LLP**

**TOPIC:**

**Planning for an Uncertain Future:**

Current Developments; Proposed Legislation;

Will Generous Estate & Gift Exemptions Sunset in 2016;

How do these Issues Impact your Client's Income, Estate and Charitable Plans?

Hosted By:



# 2023 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 (\$3,000)

- 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

## BRONZE SPONSOR (\$1,250)

- 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 (\$575)

- 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

# SPONSOR REGISTRATION FORM

**Please Check One:**

\$10,000 Platinum Sponsor

\$1,250 Bronze Sponsor

\$5,000 Gold Sponsor

\$575 Patron Sponsor

\$3,000 Silver Sponsor

\$250 Non Profit Sponsor

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

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Please make checks payable to:

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

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5890 South Pine Island Road, Davie, FL 33328

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**For additional Sponsorship information please reach out to  
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**Please submit your ad electronically to: [info@jointtaxandestate.com](mailto:info@jointtaxandestate.com)**