



**2014-2015 Season**  
 Russell Goldstein, President  
 Frank Bourget, Vice President  
 Claudia Cucitro, Treasurer  
 Lindsey Jackson, Secretary

**2015 Summer Forum \_Sponsorship Committee Call  
 November 25, 2014  
 1:00pm**

**Committee members**

RSVP/Regret	Committee Members	SF Committee Focus	Organization	Email/Phone
RSVP	Diane Jezek-Powell	Sponsorships Chair	Gomper's Habilitation Center	<a href="mailto:Djezek-powell@gomperscenter.org">Djezek-powell@gomperscenter.org</a> 602-283-3931
RSVP	Liz Kaplan	Sponsorships - Co-chair		<a href="mailto:LizKaplan11@gmail.com">LizKaplan11@gmail.com</a> 602-463-1240
RSVP	Tiffany House	Sponsorships Committee Member	MasterTech Financial	<a href="mailto:tiffany@mastertechfinancial.com">tiffany@mastertechfinancial.com</a> 480-905-3260 480-242-9956
	Russell Goldstein	PGRTAZ President	US Trust, Bank of America Private Wealth Management	<a href="mailto:Russell.goldstein@ustrust.com">Russell.goldstein@ustrust.com</a> 602-523-2924
RSVP	Stephanie Weadock	Administrative Support	Premium Organization	<a href="mailto:info@pgrtaz.org">info@pgrtaz.org</a> 602-840-2900

**1:00pm: Opening round**

- Time restraints
- Approve/amend agenda

**Action Items:**

Assigned	Action Items	Target Due Date
Stephanie	Forward most current sponsor opportunities/benefits summary and sponsor commitment/invoice form to committee members	11/11/2014
Diane	Consolidate sponsor historical information and forward to committee members	11/14/2014
Russell	Reach out to Cresendo for a possible sponsorship	11/26/2014

**2014 Sponsor Renewal Status' (Diane)**

**2015 Sponsor Appeal**

- Potential sponsor list
- Russ' list of potential speakers and sponsors
  - Identify potential sponsors/omit speakers
  - Complete contact information
- Notice/script
- Outreach method
  - Email vs. personal phone calls
- Assignments



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**Target deadlines.**

- Sponsor renewal outreaches and feedback: **11/26/14**
- Begin new sponsorship appeal: **12/1/2014**
- Re-evaluating outreach and determining if we need to expand the asks beyond our current lists: **12/2014**
- Deadline to be included on the Save the Date piece: **12/12/14**
- Sponsorship secured and **funds received** to be included in proceedings booklet: **5/11/2015**

**Calendar next call**

**Adjourn**