



August 21, 2020 Conference Partnerships/Registrations

<p>_____ \$5,000 Event Partner/Breakfast Plenary</p> <p>_____ \$3,000 Lunch Plenary Partner</p> <p>_____ \$1,500 Social Engagement Lunch Box Partner (1)</p> <p>_____ \$1,500 Breakout Partner (Limited Available)</p> <p>_____ \$1,000 Program Partner (multiple available)</p>	<p>_____ \$750 Program Partner (multiple available)</p> <p>_____ \$500 Program partner (multiple available)</p> <p>_____ \$250 Business Card Ad (multiple available)</p> <p>_____ other amt – Supporter (multiple available)</p> <p>_____ \$95 -- 1 conference Early Bird admission</p> <p>_____ \$115 – 1 conference standard admission</p> <p>_____ \$300 – 4 conference admissions</p>
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2020/2021 Annual Partnerships and Annual Memberships

<p>_____ \$1,000 Annual Certification Partner</p> <p>_____ \$1,000 Annual Leadership Partner (2 avail)</p> <p>_____ \$750 Membership Mailings Sponsor</p> <p>_____ \$500 Monthly Luncheon Partner (Limited Available)</p> <p>_____ preferred month 1st choice</p> <p>_____ preferred month 2nd choice (refer to program line up to view programs available)</p>	<p>_____ \$250 Virtual Meeting Partner (Limited Available)</p> <p>___ Sep 15 ___ Sept 30 ___ Oct 20 ___ Oct 29</p> <p>___ Nov 17 ___ Jan 12</p> <p>_____ \$100 + refreshments Happy Hour Partner (Limited available)</p> <p>_____ \$100 + giveaway Monthly Mtg Giveaway (Limited Available)</p> <p>Annual Membership:</p> <p>_____ \$175 annual: ___ individual ___ corporate</p> <p>_____ \$465 prepaid w/lunch: ___ Indiv ___ Corp</p>
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Yes!! Sign us up for the noted items above!!!

Name _____

Organization _____

Phone _____ Email _____

Signature: _____

PARTNERSHIP OPPORTUNITIES

Arizona Planned Giving Conference



Each partner has the opportunity to have one of their business cards placed in the Social Engagement Lunch Box to be sent to each attendee ahead of the event. (details provided upon partnership confirmation)

	Event Partner - Breakfast Plenary	Lunch Plenary Partner	Social Engagement Lunch Box Partner	Break-Out Session Partner	Program Partner	Program Partner	Partner	Marketing Partner	Supporter
				4 of 9 remaining					\$100 - \$499
	Sold	Sold	Sold	\$1,500	\$1,000	\$750	\$500	\$250	
Recognition on all marketing materials	✓	✓	✓	✓	✓	✓	✓		
Organizational Logo & Link on PGRTAZ Website	✓	✓	✓	✓	✓	✓	✓	✓	
Organizational Logo on marketing materials	✓								
Partner Page on Virtual Conference Platform	✓	✓	✓	✓	✓	✓	✓		
Podium Presentation Time	5 minutes at Breakfast	5 minutes at Lunch		2 minutes at Break-Out Session					
Placement of Marketing Collateral	Business card placed in social engagement lunch box	Business card placed in social engagement lunch box	Business card and marketing flyer/brochure placed in social engagement lunch box	Business card placed in social engagement lunch box	Business card placed in social engagement lunch box	Business card placed in social engagement lunch box	Business card placed in social engagement lunch box	Business card placed in social engagement lunch box	
Conference Proceedings Virtual Booklet Advertisement	Inside front or back cover and on the Board Thank You page (\$500 value)	full page (\$350 value)	full page (\$350 value)	full page (\$350 value)	half page (\$350 value)			Business card size ad	
Complimentary Conference Registrations	Three (3) (\$285 value)	Two (2) (\$190 value)	Two (2) (\$190 value)	Two (2) (\$190 value)	Two (2) (\$190 value)	One (1) (\$95 value)			

Proceedings Booklet Advertisement Specifications
 Booklet Flat Size prior to binding: 11"w x 8.5"h
 Full page ad: 5.5"w x 8.5"h
 Business card ad: 3.5"w x 2.0"h
 Delivery format: JPG or PDF
 Ink: full color
 Binding: Saddle stapling

All ads must be submitted to info@pgrtaz.org no later than August 7, 2020.



2020 Annual Partnership Benefits/Expectations

(for monthly virtual meetings, refer to program line up following this summary)

	Monthly Meeting Partner (4 in 2021)	Virtual Meeting Partner (6 in 20/21)	Happy Hour Partner (5 in 20/21)	Annual Continuing Education Partner (1)	Monthly Meeting Giveaway (4 in 20-21)	Leader Scholarship X2
	2 of 4 sold	2 of 6 sold	1 of 5 sold		1 of 4 sold	
Amount	\$500	\$250	\$100	\$1,000	\$100	\$1,000
Benefits						
logo/link on PGRT website for season	x	x	x	x	x	x
logo on event marketing materials	x	x	x			x
placing materials at events	on lunch tables	on rolling power point ahead of program	at event	at registration	at registration	at registration
Group thank you to season partners	conf program	conf program	conf program	conf program	conf program	conf program
Business card ad in conference program				x		x
1 free registration	at partnered mtg	at partnered virtual mtg		at 1 monthly mtg of choice		at 1 monthly mtg of choice
newsletter article about CE credit sought for mtgs				x		
Opportunity to submit article for consideration of inclusion in newsletter	x	x	x	x	x	x
Partner Expectations						
	introduce speaker					Sit on scholarship committee
	introduce speaker; up to 5 min to speak about business	Introduce speaker or facilitator; speak up to 2 min about bs.	provide refreshments; secure date and location	PGRT will seek CE for CFRE, CFP and liase with CAP	provide giveaway with value of at least \$25; pull ticket at end of program	individual selected will register for national conference



Partnership requests will be on a first come, first serve basis. Please select a 1st and 2nd choice and we will do our best to accommodate your preference.

Planned Giving Round Table of Arizona Monthly Programs

<p>September 15, 2020 Virtual Program Mike King “Electronic Estate Planning Document and Online Notarizations”</p> <p>Thank you for your partnership of this program!!</p> 	<p>September 30, 2020 Virtual Program Marcia Inger Navratil “Drafting Gift Agreements”</p> <p>Thank you for your partnership of this program!!</p> <p>Salazar Resource Development</p>
<p>October 20, 2020 Virtual Program Russell Willis “Income & Gift Tax Implications of Establishing a Split Interest Gift for a 3rd Party”</p> <p>Thank you for your partnership of this program!!</p>	<p>October 29, 2020 Virtual Program Larry Johnson “Asset-Based Giving”</p> <p>Thank you for your partnership of this program!</p> 
<p>November 17, 2020 Virtual Program Tim Prosser “Planned Giving Case Study: The Watershed Gift”</p> <p>Thank you for your partnership of this program!</p> 	<p>January 12, 2021 Virtual Program Speaker: TBD “Topic TBD”</p>
<p>January 19, 2021 Luncheon Program Joe Bull “National Planned Giving Metrics/Standards”</p> <p>Thank you for your partnership of this program!</p> 	<p>February 16, 2021 Luncheon Program Rebecca Bibleheimer “Give It Away Now: Thinking Beyond Retirement Income in Split Interest Gifts”</p>
<p>March 16, 2021 Luncheon Program Craig Showalter “Maximizing Required Minimum Distributions”</p>	<p>April 20, 2021 Field Trip A New Leaf “A Successful Planned Giving Program”</p>