



Tampa Bay

Estate Planning Council

23 Sponsorship
24 Opportunities



We believe in the power of community.

The Tampa Bay Estate Planning Council is made up of a diverse group of estate planning professionals in our area. Our membership consists of attorneys, fiduciaries, accountants, investment advisors, charitable giving specialists, family office executives, insurance agents, and valuation experts. As an affiliate of The National Association of Estate Planners & Councils (NAEPC), we foster the multi-disciplinary approach to estate planning designed to meet the needs of clients at all stages of their lives, with an emphasis on wealth preservation and legacy.

We strive to provide our members with opportunities to enhance their skills and expand their professional network.

Exciting Line-up of Programs for 2023-2024



August 23, 2023

5:30 – 7:30 PM
Corks, Forks & Trivia
Zydeco Brew Works



January 17, 2024 (Tentative)

5:15 – 7:30 PM
New Year, New Leaf
Time Management
Centre Club Tampa (Tentative)



September 12, 2023

5:00 – 7:30 PM
Sam Donaldson
Keeping Up with the Cool Kids: Estate
Planner’s Guide to Recent Tax Developments
Hilton St. Petersburg Carillon Park

Community Foundation Tampa Bay Speaker Series



February 2024 – TBA



October 17, 2023

5:15 – 7:30 PM
Alan Gassman
Corporate Transparency, Privacy, and Entity
Planning Strategies in View of Scheduled Law
Changes
Stetson Tampa Law Center



March 20, 2024

5:15 – 7:30 PM
J. Richard Caskey
Dispute Resolutions & Collaborative Mediation
Stetson Tampa Law Center (Tentative)



November 14, 2023

5:30 – 7:30 PM
Dr. Kathleen Rehl
Widows, Wives & Friends: Beyond the Basic
Estate Planning for Women
Metropolitan Ministries | Red Door



April 29, 2024

11:30 AM – 1:30 PM
Raj Malviya
10 Land Mines You Don’t Want to Plant
in a Revocable Trust
Children’s Cancer Center

Community Foundation Tampa Bay Speaker Series



December 5, 2023








6:00 – 8:00 PM
Holiday Social & Sweater Soiree
1001 Water Street (Tentative)



May 16, 2024

5:00 – 7:30 PM
Spring Drop-In Social

The Tampa Bay Estate Planning Council offers annual sponsorship packages designed to help maximum year-long exposure and customizable options, allowing you to select the options that meet your organization's goals.

Benefits at a Glance	\$2,000	\$1,000	\$500
 Complimentary Council Membership (membership year is July – June)	2 memberships	1 membership	1 membership
 Sponsor Recognition (In-person events) Logo on slides played prior to Council events. Logo and verbal recognition during opening remarks of Council event.	✓	✓	✓
 Sponsor Spotlight (In-person events) Opportunity to present a 3-minute live commercial at Council event during the programming season.	1 event per season		
 Virtual Sponsor Profile 12-month virtual listing on TBEPC.org.	Linked logo, 75-word company description, contact information	Linked logo, 50-word company description, contact information	Linked logo, contact information
 Sponsor Hosted Webinar to be promoted by TBEPC. (TBEPC to promote sponsor-organized webinar, sponsor manages registration.)	Monthly	1 per quarter	1 time (annually)
 Sponsor White Paper or Article TBEPC-facilitated distribution of sponsor-provided white-paper or article to TBEPC contacts, you provide the content or URL.	1 per quarter	2 times (annually)	1 time
 Annual Passport for TBEPC Events Participate in Council hosted events throughout the year (includes Council's Holiday Social and Drop-In Social)	✓	✓	✓



2023- 2024 Sponsor Commitment Form

Please remember to indicate your commitment level.

\$2,000 \$1,000 \$500

If you would like to discuss partnership opportunities in greater detail, please contact our sponsorship team.

If you would like to discuss partnership benefits or have general questions about our Council, please contact Christine Brown at (813) 855-1017.

All Sponsorships are based on the 2023-2024 program year.

Company Name _____

Web site _____

Primary Sponsor Contact Information

Name _____

Company _____

Title _____

Address _____

City _____ State _____ ZIP _____

Phone _____ Email _____

Web Site _____

Billing Information

Name _____

Company _____

Title _____

Address _____

City _____ State _____ ZIP _____

Phone _____ Email _____

Payment Method:

Please Invoice Check Enclosed

Credit Card visit TBEPC.org/2023Sponsors or call (813) 855-1017 for processing

Send checks made payable to Tampa Bay Estate Planning Council to

Tampa Bay Estate Planning Council

12191 W Linebaugh Ave # 312

Tampa, FL 33626