



Probate Attorneys of San Diego

2020

SPONSORSHIP BROCHURE



Dear Supporters,

We are excited to introduce the Probate Attorneys of San Diego's (PASD) 2020 Sponsorship Brochure. We rely on your support to help us fulfill PASD's mission of serving the public and legal profession by enhancing the practice of law in the areas of Trusts, Estates, Conservatorships, Guardianships, and Elder Law to promote justice, professional excellence and respect for the law.

PASD is the specialty bar association for San Diego's Probate community, with over 300 members and 800 people on our mailing list. PASD was born from the desire to bring together San Diego's Probate professionals in a collegial setting while providing advocacy for and education focused on the needs of local Probate practitioners. This initial vision continues strongly today through our monthly continuing education meetings, our Annual Symposium and our Annual Update.

Our monthly continuing education meetings provide networking opportunities and educational presentations over lunch or, occasionally, dinner. The Annual Symposium offers an intensive day of education and training from our Probate Judges and experienced attorneys. At the beginning of each year, the Probate Judges and Probate Court Staff provide a "State of the Court" review of new laws, local rules and forms, as well as practice pointers, at the Annual Update.

Community building is the focus of PASD's Annual Membership Mixer and Annual Gala. At the Membership Mixer, we thank our members for their support through a relaxed happy hour gathering at a local restaurant. Our Annual Gala (also known as the "Probate Prom") is our annual dinner dance, where we enjoy good food, good music, good drinks and good company. During the event, we often also recognize an outstanding member of our Probate community.

In keeping with our mission, we serve the greater public and legal community through the biennial publication of the Probate Handbook, by developing and proposing Probate-related legislation at the annual California Conference of Bar Associations ("CCBA") meeting, and by commenting on proposed legislation.

We encourage you to contact us quickly to secure your first sponsorship choice. In addition, we are open to discussing other sponsorship opportunities with you if none of the following meet your needs. Thank you for your interest and for supporting our exciting work in the Probate community!

Yours sincerely,

Shannon N. Montisano  
*President*

Hilary Vrem  
*Immediate Past President*

Monique Matosian-Bharucha  
*Chair of Sponsorship Committee*

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## A CLOSER LOOK AT PASD

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San Diego's Premier Probate Bar Association

### OUR MISSION

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*To serve the public and legal profession by enhancing the practice of law in the areas of Trusts and Estates, Conservatorships, Guardianships, and Elder Law to promote justice, professional excellence and respect for the law.*

### OUR VISION

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*To advance the Probate profession through quality specialized education, advocacy and one-on-one connection*

### OUR VALUES

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*Integrity • Collegiality • Community • Education*

PASD betters the Probate profession through its activities, including legislative advocacy, providing its Members with necessary resources, addressing pressing issues affecting Probate practitioners, and liaising between practitioners and our local Judicial officers and staff.

PASD prioritizes relationship-building through its programming and events in order to improve professionalism and career satisfaction within the Probate community. PASD organizes its social events to enhance professional civility through networking and camaraderie. These values are further fostered through PASD's in-person education and training, formal recognition of exceptional Probate practitioners, mentorship of law students and younger attorneys, and community outreach activities.

PASD elevates San Diego's Probate community through quality, affordable in-person training and education programs. Our programs are taught by high caliber thought-leaders from around California, and our educational approach is designed to encourage work-life balance and professional excellence. We also continually develop and update existing resources and practice tools, such as our *Probate Handbook*, California's only comprehensive Probate handbook.

Since its inception in May 2012, PASD has also successfully moved legislation forward for consideration by the California Legislature, been instrumental in obtaining the first increase in Court Appointed Attorney fees since 1978, and created one of California's only private training for Court Appointed Attorneys.

## MONTHLY EDUCATION

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### Throughout 2020

*We endeavor to hold monthly continuing education programs, which are usually lunch meetings. These monthly lunch meetings are held on the third Wednesday of every month, between 12 and 1:15 pm. On occasion, we will provide an evening program, which is presented after work for 1 to 3 hours. The schedule of monthly continuing education programs is attached at the back of this Brochure. Attendance varies between 80 to 150 attendees.*

*We are limited to one Season Education Sponsor per year; however, each educational program may have several Exhibitors in addition to the 2020 Season Education Sponsor.*

### SEASON EDUCATION SPONSOR

*\$5,000 (Limited to One)*

- One ticket to each monthly educational program in 2020 season
- Logo recognition of Season Education Sponsor in the printed materials distributed during each monthly educational program (*black and white only*)
- Logo and Name recognition of Season Education Sponsor on PASD website with hyperlink to Sponsor's website throughout the 2020 Season
- Logo recognition of Season Education Sponsor on PASD promotional email communications for each monthly educational program
- Verbal recognition of Season Education Sponsor at each 2020 monthly educational program
- Logo recognition of Season Education Sponsor in slide presentation at beginning and end of 2020 monthly educational programs (*provided AV display used*)
- Option to set up Exhibitor's Table at each educational program. Premiere reserved location for set-up of Exhibitor's Table
- Banner displayed at each monthly continuing education program if supplied by Sponsor
- Opportunity to provide written or other marketing materials at each monthly continuing education program (*subject to PASD approval*)

## MONTHLY EDUCATION SPONSORSHIPS

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### EXHIBITOR

\$500 per monthly program

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- One ticket to sponsored educational program
- Verbal recognition of Exhibitor at sponsored educational program
- Logo recognition in slide presentation at beginning and end of sponsored educational program (*provided AV display used*)
- Option to set up Exhibitor's Table at sponsored educational program (*location assigned by PASD*)
- Banner displayed at sponsored educational program if supplied by Exhibitor
- Opportunity to provide written or other marketing materials at sponsored monthly continuing education program (*subject to PASD approval*)

## MEMBERSHIP MIXER

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June/July 2020

*This event is our annual appreciation mixer held at a local restaurant. Each member will be treated to a free drink and be able to network and connect with fellow members and PASD Directors in an informal cocktail atmosphere.*

*Typically attended by approximately 50 to 75 people.*

### EVENT SPONSOR

\$2,000 (*Limited to One*)

- Verbal recognition of Sponsor during Membership Mixer
- Logo and Name recognition on PASD website with hyperlink to Sponsor's website
- Logo recognition on PASD promotional email communications for Membership Mixer
- Banner displayed during Membership Mixer if supplied by Sponsor
- Opportunity to provide written or other marketing materials at Membership Mixer (*subject to PASD approval*)

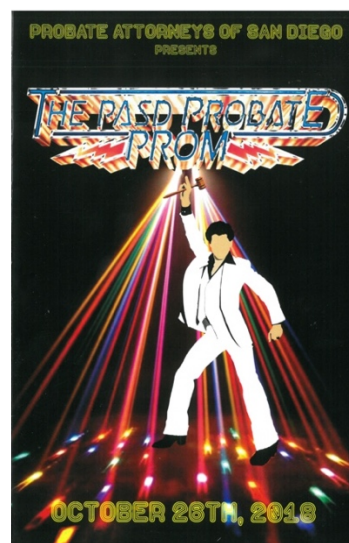
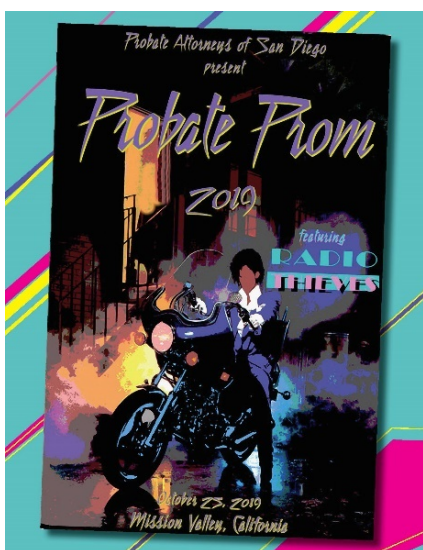


## ANNUAL GALA

Friday, October 30, 2020

*The Annual Gala (a.k.a the “PASD Probate Prom”) will be held at the DoubleTree Hotel in Mission Valley. A No-Host Bar and Dinner will be served, and entertainment is provided. This event is usually attended by the Probate Judges and several of the Probate Court Staff. Historically, the Judges have recognized a member of PASD for his or her exceptional service to San Diego’s Probate community.*

*Typically attended by 200 to 250 people.*



### EVENT SPONSOR

**\$5,000** (*Limited to Two*)

- Ten tickets together at a premiere reserved table with table signage
- Logo and/or Name recognition of Event Sponsor on PASD website with hyperlink to Sponsor’s website throughout the 2020 Season
- Logo recognition of Event Sponsor on invitations to event (*must be committed by 8-1-2020*)
- Logo recognition of Event Sponsor on all PASD promotional communications for event
- Banner displayed if supplied by Sponsor during event
- Opportunity to host special sponsorship entertainment station during event, e.g. Step and Repeat (*subject to PASD approval*)
- Verbal recognition as Event Sponsor during event
- Logo recognition as Event Sponsor in slide presentation during event
- Logo recognition as Event Sponsor in printed event program



## ANNUAL GALA SPONSORSHIPS

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### RECEPTION SPONSOR

\$2,000 (*Limited to Three*)

- Two tickets together at reserved seats
- Logo recognition of Reception Sponsor during Reception
- Logo and/or Name recognition of Reception Sponsor on PASD website with hyperlink to Sponsor's website
- Logo recognition of Reception Sponsor on certain PASD promotional communications for event
- Verbal recognition of Reception Sponsor during event
- Logo recognition of Reception Sponsor in slide presentation during event
- Logo recognition of Reception Sponsor in printed event program

### TABLE WINE SPONSOR

\$2,000 (*Limited to Two*)

- Two tickets together at reserved seats
- Logo recognition of Table Wine Sponsor on each table at event
- Logo and/or Name recognition of Table Wine Sponsor on PASD website with hyperlink to Sponsor's website
- Logo recognition of Table Wine Sponsor on all PASD promotional communications for event
- Verbal recognition of Table Wine Sponsor during event
- Logo recognition of Table Wine Sponsor in slide presentation during event
- Logo recognition of Table Wine Sponsor in printed event program

### PLATINUM SPONSOR

\$2,500

- Ten tickets together at a reserved table with table signage
- Logo and/or Name recognition of Platinum Sponsor on PASD website
- Logo recognition of Platinum Sponsor in slide presentation during event
- Logo recognition of Platinum Sponsor in printed event program

## ANNUAL GALA SPONSORSHIPS

### SAPPHIRE SPONSOR

\$1,250

- Four tickets together at reserved seats
- Logo and/or Name recognition of Sapphire Sponsor on PASD website
- Logo recognition of Sapphire Sponsor in slide presentation during event
- Logo recognition of Sapphire Sponsor in printed event program

### GOLD SPONSOR

\$750

- Two tickets together at reserved seats
- Logo and/or Name recognition of Gold Sponsor on PASD website
- Logo recognition of Gold Sponsor in slide presentation during event
- Logo recognition of Gold Sponsor in printed event program

### SUPPORTER SPONSOR

\$250

- One ticket at reserved seat
- Name recognition of Supporter Sponsor on PASD website
- Name recognition of Supporter Sponsor in slide presentation during event
- Name recognition of Supporter Sponsor in printed event program



*Entertainment & Specialty Sponsorships are also available at the Annual Gala.  
Please contact Monique Matosian-Bharucha or Joanne Briggs to find out more.*

## ANNUAL SYMPOSIUM

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December 4, 2020

*The Annual Symposium (formerly Court-Appointed Attorney Training) provides attendees with 6 hours of continuing education credit on the subjects of Court procedures, Conservatorships, Guardianships and Ethics. Various topics are presented by multiple speakers, including the Probate Judges, and include up-to-date information about the Court procedures and rules related to the difficult task of acting as a court-appointed attorney for a Conservatee or Ward. As in past years, the Annual Symposium will be held at the Handlery Hotel in Mission Valley.*

*Typically attended by over 100 people.*

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### EVENT SPONSOR

*\$2,500 (Limited to One)*

- Logo and Name recognition of Event Sponsor on PASD website with hyperlink to Sponsor's website
- Logo recognition of Event Sponsor on PASD promotional materials (including e-blasts and social media) for event
- Logo recognition of Event Sponsor in printed materials distributed during event
- Four (4) tickets with reserved seats to attend event
- Reserved premiere location for set-up of Exhibitor's Table
- Verbal recognition of Event Sponsor at event
- Logo recognition of Event Sponsor in slide presentation at various times during event
- Banner displayed during event if supplied by Sponsor
- Opportunity to provide written or other marketing materials at event (*subject to PASD approval*)

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### EXHIBITOR

*\$750*

- One (1) ticket to attend event
- Set-up of Exhibitor's Table (*location assigned by PASD*)
- Verbal recognition of Exhibitor at Event
- Logo recognition of Exhibitor in slide presentation at various times during event
- Banner displayed during event if supplied by Sponsor
- Opportunity to provide written or other marketing materials at event (*subject to PASD approval*)

## ANNUAL UPDATE

January 7, 2021

*The Annual Update is as close as we get to a trade show for San Diego's Probate attorneys. At the Double Tree Hotel in Mission Valley, attendees start with a hot buffet breakfast while meeting our sponsors and networking. Subsequently, the Probate Judges and Probate Court Staff enlighten attorneys, fiduciaries or other interested persons on the new year's changes to the Probate Code and Local Rules and how those changes might affect the procedures, protocols or practices used by the San Diego Probate Court.*

*Typically attended by 250 to 300 people.*



### EVENT SPONSOR

**\$3,000** (*Limited to Two*)

- Logo and Name recognition on PASD website with hyperlink to Event Sponsor's website
- Logo recognition of Event Sponsor on PASD promotional materials for event
- Logo recognition of Event Sponsor at the back of printed materials handout for event
- Four tickets with reserved seats to attend event
- Reserved premiere location for set-up of Exhibitor's Table
- Verbal recognition of Event Sponsor at event
- Logo recognition of Event Sponsor in printed event program
- Logo recognition in slide presentation at various times during event
- Banner displayed during event if supplied by Sponsor
- Opportunity to provide written or other marketing materials at event (*subject to PASD approval*)

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## EXHIBITOR

\$750

- One ticket to attend event
- Set-up of Exhibitor's Table (*location assigned by PASD*)
- Verbal recognition of Exhibitor at event
- Logo recognition of Exhibitor in printed event program
- Logo recognition in slide presentation at various times during event
- Banner displayed during event if supplied by Sponsor
- Opportunity to provide written or other marketing materials at event (*subject to PASD approval*)





## 2022-2023 PROBATE HANDBOOK

December 2021

*Sponsoring the 2022-2023 Probate Handbook provides sponsors with two years of repeated exposure to a large audience of Probate professionals.*

*PASD has created California's only comprehensive hands-on Probate guide utilized by Practitioners, Judges and Pro se parties. Each of the 40+ chapters focuses on a particular topic or step in Probate proceedings, discusses common issues and provides instructions, practice tips, examples and "best practices."*

*Every 2 years, PASD updates the Handbook to reflect current best practice by calling upon highly experienced local practitioners. We released the 2020-2021 Handbook in December 2019, and we are now seeking sponsors for the 2022-2023 publication.*

*Printed reference copies of the Handbook are available in the Probate Business Office and in all San Diego County Law Libraries. In addition, all 300+ PASD Members receive a digital copy of the Handbook on a thumbdrive (the "Probate Pill") and can access and download a PDF copy from the PASD website.*

### PUBLICATION SPONSOR

*\$5,000 (Limited to Two)*

- Logo recognition (*limited to 3 colors*) of Publication Sponsor on outside of thumbdrive (a.k.a. the "Probate Pill") for 2 years
- Logo recognition of Publication Sponsor on PASD's website with hyperlink to Sponsor's website from December 2021 to December 2023
- Logo and name recognition of Publication Sponsor on PASD's website alongside website-accessible PDF copy of Handbook from December 2021 to December 2023
- Full page advertisement of Publication Sponsor at the beginning of the 2022-2023 Handbook edition (*black & white only in printed materials*)
- Logo recognition of Publication Sponsor in the 2022-2023 Probate Handbook
- Verbal recognition of Publication Sponsor at publication launch at 2021 Annual Symposium and at January 2022 meeting
- Banner displayed during publication launch at 2021 Annual Symposium and at January 2022 meeting if supplied by Sponsor
- Set up of Exhibitor's Table at 2021 Annual Symposium and at January 2022 meeting
- Opportunity to provide written or other marketing materials during publication launch at 2021 Annual Symposium and at January 2022 meeting (*subject to PASD approval*)

## 2022-2023 PROBATE HANDBOOK SPONSORSHIPS

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### PLATINUM HANDBOOK SPONSOR

\$2,500

- Logo recognition of Platinum Handbook Sponsor on PASD's website with hyperlink to Sponsor's website
- Name recognition of Platinum Handbook Sponsor on PASD's website alongside website-accessible PDF copy of Handbook from December 2021 to December 2023
- Full page advertisement of Platinum Handbook Sponsor in the 2022-2023 Probate Handbook (*black & white only in printed materials*)
- Logo recognition of Platinum Sponsor in the 2022-2023 Probate Handbook

### SAPPHIRE HANDBOOK SPONSOR

\$1,250

- Half page advertisement of Sapphire Handbook Sponsor in the 2022-2023 Probate Handbook (*black & white only in printed materials*)
- Logo recognition of Sapphire Handbook Sponsor in the 2022-2023 Probate Handbook

### GOLD HANDBOOK SPONSOR

\$750

- Quarter page advertisement of Gold Handbook Sponsor in the 2022-2023 Probate Handbook (*black & white only in printed materials*)
- Logo recognition of Gold Handbook Sponsor in the 2022-2023 Probate Handbook

### SUPPORTER HANDBOOK SPONSOR

\$100

- Name recognition of Supporter Handbook Sponsor in the Probate Handbook for 2 years



## PASD LEGISLATIVE ADVOCACY

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### Throughout 2020

*Consistent with our mission to improve the practice of Probate law, we are committed to our advocacy work to improve Probate law and access to justice. A significant portion of PASD's advocacy work involves drafting legislative resolutions and advocating for the adoption of these resolutions by the California Legislature at the annual California Conference of Bar Associations (CCBA).*

*The CCBA conference brings together over 300 delegates from bar associations all over California, with the mission of improving laws and the administration of justice by passing legislative resolutions and lobbying for the adoption of such resolutions by California's legislators. In 2019, PASD's delegates successfully had eight of our legislative resolutions approved at the CCBA conference; these resolutions are now under consideration by the California Legislature.*

*The 2020 CCBA Conference is scheduled to take place in San Diego. Sponsorships offset the costs related to PASD delegates' participation in the annual CCBA conference, while offering sponsors state-wide exposure to every bar association in attendance through logo recognition on PASD tchotchke and T-shirts (which always have an amusing probate-related slogan, such as "Nothing Says Fun Like Probate").*

### PASD LEGISLATIVE ADVOCACY SPONSOR     \$5,000 (*Limited to Two*)

- Premium logo recognition (*limited to 3 colors*) of PASD Legislative Advocacy Sponsor on T-shirt worn by PASD delegates at CCBA conference
- Logo and/or Name recognition of PASD Legislative Advocacy Sponsor on PASD website with hyperlink to Sponsor's website throughout the 2020 Season
- Logo recognition of PASD Legislative Advocacy Sponsor on any PASD promotional materials for event
- Verbal recognition of PASD Legislative Advocacy Sponsor at various monthly continuing education meetings



## PASD LEGISLATIVE ADVOCACY SPONSORSHIPS

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### PLATINUM ADVOCACY SPONSOR

\$2,500

- Logo recognition of Platinum Advocacy Sponsor (*black & white only*) on T-shirt worn by PASD delegates at CCBA conference
- Logo and/or Name recognition of Platinum Advocacy Sponsor on PASD website with hyperlink to Sponsor's website
- Verbal recognition of Platinum Advocacy Sponsor at various monthly continuing education meetings

### SAPPHIRE ADVOCACY SPONSOR

\$1,250

- Logo recognition of Sapphire Advocacy Sponsor (*black & white only*) on T-shirt worn by PASD delegates at CCBA conference
- Logo and/or Name recognition of Sapphire Advocacy Sponsor on PASD website
- Verbal recognition of Sapphire Advocacy Sponsor at monthly continuing education meeting after CCBA conference

### GOLD ADVOCACY SPONSOR

\$750

- Logo recognition of Gold Advocacy Sponsor (*black & white only*) on T-shirt worn by PASD delegates at CCBA conference
- Name recognition of Gold Advocacy Sponsor on PASD website

### SUPPORTER ADVOCACY SPONSOR

\$100

- Logo recognition of Supporter Advocacy Sponsor (*limited to black & white*) on T-shirt worn by PASD delegates at CCBA conference
- Name recognition of Supporter Advocacy Sponsor on PASD website

## CONTACT US

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Thank you!

*Our Sponsorship Opportunities are available on a first-come, first-served basis so we encourage you to contact us quickly to secure your first sponsorship choice.*

*In addition, we are open to discussing other sponsorship opportunities with you if none of the following meet your needs.*

*Thank you again for your interest in supporting PASD and the valuable work we do for San Diego's Probate community, as well as for all of us in California.*

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**Joanne Briggs**

*PASD Administrator*

(619) 929-2981

[sdprobateattorneys@gmail.com](mailto:sdprobateattorneys@gmail.com)

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**Monique Matosian-Bharucha**

*Chair of Sponsorship Committee*

(619) 696-7066

[monique@bjilaw.com](mailto:monique@bjilaw.com)

<https://pasd.memberclicks.net>

