



Probate Attorneys of San Diego

2024

SPONSORSHIP BROCHURE





Dear Supporters,

We are excited to introduce the Probate Attorneys of San Diego's (PASD) 2024 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, and promoting justice, professional excellence and respect for the law.

PASD is the specialty bar association for San Diego's Probate community, with over 400 members and 1500 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.

Throughout the year, we focus on community building through networking receptions after in-person CLE classes, as well as through our 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, and also recognize an outstanding member of our Probate community.

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 in and support of PASD's exciting work in the Probate community!

Yours sincerely,



Shannon N. Taylor
President



Monique Matosian-Bharucha
Chair of Sponsorship Committee



SEASON & MONTHLY EDUCATION MEETINGS

Throughout 2024

Our monthly continuing education meetings occur throughout the year, typically on the third Wednesday of each month.

During the 2024 Season, we anticipate hosting approximately one in-person meeting every quarter from 5 p.m.-6 p.m. and followed by a Networking Reception.¹ All other monthly education meetings will be held via Zoom.

SEASON EDUCATION SPONSOR

\$7,500

(Limited to One)

- Two (2) complimentary tickets to each CLE meeting in 2024 Season
- Brief speaking opportunity (i.e. informational presentation) at start of each CLE meeting
- Two (2) marketing slides displayed in rotation before CLE meetings²
- Exhibitor Table at in-person CLE meetings^{5,6}
- Prominent logo recognition on promotional emails for CLE meetings with hyperlink (*promotional emails may also promote Networking Reception sponsor(s) with prominent logo recognition*)
- Logo and name recognition on PASD homepage and sponsor page with hyperlink for 2024 season
- Verbal recognition at each 2024 monthly CLE meeting
- Marketing flyer or brochure to be distributed to attendees^{2,3}

MONTHLY EDUCATION SPONSOR

\$600/in person meeting⁴

\$500/online meeting

(One Monthly Education Sponsor per CLE meeting)

- One (1) complimentary ticket to sponsored CLE meeting
- Brief speaking opportunity at start of in-person sponsored CLE meeting
- One (1) marketing slide displayed in rotation before sponsored CLE meeting²
- Exhibitor Table at in-person CLE meetings⁵
- Secondary logo recognition on promotional emails for sponsored CLE meeting
- Verbal recognition at sponsored CLE meeting
- Marketing flyer or brochure to be distributed to attendees^{2,3}

NETWORKING RECEPTIONS

March 2024, May 2024, September 2024 *(Dates subject to change)*

Networking Receptions immediately follow an in-person monthly CLE meeting, and include hosted drinks and light appetizers. Networking Receptions are 1-2 hours, and are open to all CLE attendees.

Event Sponsor must commit and pay within one month prior to event to secure exclusive sponsorship.

Exhibitor Sponsorships only available if there is no Event Sponsor.

EVENT SPONSOR

\$2,000/Event

- Event Sponsor is sole sponsor of Networking Reception
- Event Sponsor is also the Monthly Education sponsor for that month's preceding CLE^{1,4}
- Prominent logo and name recognition on promotional emails for CLE and Networking Reception with hyperlink (*promotional emails may also promote Season CLE sponsor*)
- May provide one (1) to three (3) Opportunity Drawings^{2,6}
- Five (5) tickets to Networking Reception
- 3-minute speaking opportunity during Networking Reception
- Two (2) marketing slides displayed in rotation at beginning of CLE meeting immediately preceding Networking Reception²
- Logo and name recognition on PASD homepage and sponsor page with hyperlink
- Marketing flyer or brochure to be distributed at or after Networking Reception^{2,3}

EXHIBITOR

\$500/Event

- One (1) ticket to sponsored Networking Reception
- Name recognition on promotional emails for Networking Reception with hyperlink (*promotional emails may also promote other Networking Reception sponsor(s)*)
- Logo and name recognition on PASD sponsor page with hyperlink
- May provide up one (1) Opportunity Drawing^{2,5}
- One (1) marketing slide displayed in rotation at beginning of CLE meeting immediately preceding Networking Reception²

Both Event and Exhibitor Sponsorships include Exhibitor Table⁵ and Verbal Recognition

MEMBERSHIP MIXER

June 2024 around 5:30 p.m. – 8:30 p.m. *(Date to be confirmed)*

Our annual Membership Mixer is a time-honored tradition where PASD recognizes and thanks its members for their support with an evening of conviviality, copious appetizers and drinks. Attendance is expected around 80-100 attendees.



Photographs by Terri Rippee

EVENT SPONSOR

(Available at either \$5,500 or \$4,500)

\$4,500 - \$5,500

(Limited to One)

- **\$5,500 Event Sponsorship:**
 - Event Sponsor is sole sponsor of Mixer
 - Exclusive logo and name recognition on promotional emails for Mixer with hyperlink
 - Must provide at least two (2) and up to six (6) Opportunity Drawings^{2,6}
- **\$4,500 Event Sponsorship:**
 - Sponsorship recognition shared with Opportunity Drawing sponsors
 - Primary logo recognition on promotional emails for Mixer with hyperlink
 - Must provide at least one (1) and up to three (3) Opportunity Drawings^{2,6}
- **Benefits of both Event Sponsorship Options**
 - Up to four (4) tickets to Mixer for non-PASD members
 - 3-minute speaking opportunity during Mixer
 - Verbal recognition during Mixer
 - Logo recognition and hyperlink to Sponsor's website on Mixer registration page, post-event email and PASD website with hyperlink to Mixer photographs
 - Logo and name recognition on PASD homepage and sponsor page with hyperlink for 2024 season
 - Exhibitor Table, and promotional or marketing materials may be provided to attendees^{2,6}
 - Inclusion of logo on Mixer photographs



Photographs by Terri Rippee

OPPORTUNITY DRAWING SPONSOR

\$300

(Limited to Six)

Opportunity Drawing Sponsorships only available if Event Sponsor sponsors at \$4,500 level.

- Must provide one (1) Opportunity Drawing per sponsorship^{2,6}
- Name recognition on promotional emails for Mixer
- Verbal recognition at event
- Name recognition on “Sponsors” webpage of PASD website (*no hyperlink*)



Copyright

Photographs by Terri Rippee



ANNUAL GALA (the “PROBATE PROM”)

Friday, October 4, 2024, 6 p.m. to 10 p.m.

The 2024 Annual Gala (a.k.a the “Probate Prom”) will be overlooking the Bay at Paradise Point. As in past years, the Prom will begin with a one-hour hosted Reception, followed by a served dinner, and capped off with the annual PASD award, music and dancing. The Prom is usually attended by the Probate Judges and several of the Probate Court Staff. Attendance is expected around 250. This event has been sold out for the last few years, and we anticipate another sell out this year.



Photography by Terri Rippee

EVENT SPONSOR

\$7,000
(Limited to Two)

- Tickets for one (1) premiere reserved table (total of 10 tickets)
- Verbal recognition at Save the Date announcement at CLE meeting⁷
- Exclusive logo and name recognition on Save the Date promotional emails and CLE advertisements
- 3-minute speaking opportunity during event
- Verbal recognition during event
- May provide souvenir or opportunity drawing to attendees^{2,6}
- Premier Logo recognition on promotional emails and CLE advertisements for event
- Logo recognition on post-event email and web-based hyperlink to event photographs⁸
- Logo recognition on PASD homepage and sponsor page with hyperlink for 2024 season
- Logo recognition in slide presentation during event (minimum of 5x full page slides per series)
- Premier Logo recognition in printed event program



STEP AND REPEAT SPONSOR

\$5,000
(Limited to One)

- Tickets for one (1) premiere reserved table (*total of 10 tickets*)
- Logo recognition on Step and Repeat backdrop
- May provide opportunity drawing to attendees^{2,6}
- Secondary Logo recognition on promotional emails and CLE advertisements for event⁹
- Logo recognition on post-event email and web-based hyperlink to Step & Repeat photographs
- Verbal recognition of Step & Repeat Sponsor during event
- Logo recognition on PASD homepage and sponsor page with hyperlink for 2024
- Logo recognition in slide presentation during event (*minimum of 3x full page slides per series*)
- Secondary Logo recognition in printed event program

RECEPTION SPONSOR

\$5,000
(Limited to One)

- Tickets for one (1) premiere reserved table (*total of 10 tickets*)
- Opportunity for additional logo recognition of Reception Sponsor during event (*details to be discussed*)
- May provide souvenir or opportunity drawing to attendees^{2,6}
- Secondary Logo recognition on promotional emails and CLE advertisements for event⁹
- Verbal recognition of Reception Sponsor during event
- Logo recognition on PASD homepage and sponsor page with hyperlink for 2024
- Logo recognition in slide presentation during event (*minimum of 3x full page slides per series*)
- Secondary Logo recognition in printed event program

BAND SPONSOR

\$5,000
(Limited to One)

- Tickets for one (1) reserved table (*total of 10 tickets*)
- Opportunity for additional logo recognition of Band Sponsor during event (*details to be discussed*)
- May provide souvenir or opportunity drawing to attendees^{2,6}
- Secondary Logo recognition on promotional emails and CLE advertisements for event⁹
- Verbal recognition of Band Sponsor during event
- Logo recognition on PASD homepage and sponsor page with hyperlink for 2024
- Logo recognition in slide presentation during event (*minimum of 3x full page slides per series*)
- Secondary Logo recognition in printed event program



Photograph by Terri Rippee



Photograph by CeCe Canton



Photograph by Terri Rippee

PHOTOGRAPHY SPONSOR

\$4,000
(Limited to One)

- Five (5) tickets together for Sponsor and their guests
- Logo recognition on candid photos of event
- Logo recognition on post-event email and web-based hyperlink to candid event photos
- May provide souvenir or opportunity drawing to attendees^{2,6}
- Name recognition on promotional emails for event⁹
- Verbal recognition of Sponsor during event
- Logo recognition on PASD sponsor page with hyperlink for 2024
- Logo recognition in slide presentation during event (*minimum of 1x full page slide per series*)
- Logo recognition in printed event program



Photographs by Terri Rippee

AMBIANCE SPONSOR

\$3,000
(Limited to Three)

- Three (3) tickets together for Sponsor and their guests
- Logo recognition of Ambiance Sponsors on each table at event
- May provide souvenir or opportunity drawing to attendees^{2,6}
- Verbal recognition of Sponsor during event
- Name recognition on promotional emails for event⁹
- Logo recognition on PASD sponsor page with hyperlink for 2024
- Logo recognition in slide presentation during event (*minimum of 1x full page slide per series*)
- Logo recognition in printed event program

WINE SPONSOR

\$2,500
(Limited to Two)

- Two (2) tickets together for Sponsor and their guest
- Logo recognition of Wine Sponsor on each table at event
- May provide souvenir or opportunity drawing to attendees^{2,6}
- Verbal recognition of Sponsor during event
- Name recognition on promotional emails for event⁹
- Logo recognition on PASD sponsor page with hyperlink for 2024
- Logo recognition in slide presentation during event (*minimum of 1x full page slides per series*)
- Logo recognition in printed event program



DIAMOND SPONSOR

\$2,500

- Ten (10) tickets together at a reserved table
- Logo recognition of Sponsor on PASD website
- Logo recognition in slide presentation during event (*minimum of 1x full page slide per series*)
- Logo recognition in printed event program

PLATINUM SPONSOR

\$1,500

- Five (5) tickets together at a table
- Logo recognition of Sponsor on PASD website
- Logo recognition in slide presentation during event (*minimum of 1x half-page slide per series*)
- Logo recognition in printed event program

GOLD SPONSOR

\$1000

- Three (3) tickets together at a table
- Logo recognition of Sponsor on PASD website
- Logo recognition in slide presentation during event (*minimum of 1x shared slide with all Gold Sponsors*)
- Logo recognition in printed event program



Photographs by Terri Rippee





ANNUAL SYMPOSIUM

Friday, December 6, 2024 *(Date subject to change)*

The Annual Symposium is a day-long event featuring multiple speakers, including the Probate Judges, who discuss up-to-date information about Court procedures and rules related to the task of appearing in Probate Court. Attendees receive 6 hours of continuing education credit, which includes one hour of Ethics credit and all of the mandatory training for court-appointed attorneys in conservatorship and guardianship matters. As in previous years, the Annual Symposium is an in-person event (location to be confirmed).

Attendance is expected around 150.

EVENT SPONSOR

\$4,000
(Limited to One)

- One (1) marketing slide at September or November monthly CLE meeting¹⁰
- Exclusive logo and name recognition on event registration page
- Primary logo and name recognition on promotional emails and CLE advertisements
- Four (4) tickets to attend event *(includes meals)*
- Exhibitor Table at reserved premiere location
- Brief speaking opportunity during event
- May provide up to three (3) Opportunity Drawings to attendees^{2,6}
- Verbal recognition during event
- Three (3) marketing slides displayed in rotation during certain event breaks²
- May provide promotional and/or marketing materials to attendees^{2,6}
- Logo and name recognition on PASD homepage and sponsor page with hyperlink for 2024 season

EXHIBITOR

\$750

- One (1) ticket to attend event *(includes meals)*
- Exhibitor Table⁵
- May provide one (1) Opportunity Drawing to attendees^{2,6}
- Verbal recognition during Event
- One (1) marketing slide displayed in rotation during certain event breaks²
- May provide promotional and/or marketing materials to attendees to attendees who visit Exhibitor Table^{2,6}

ANNUAL UPDATE

January 2025 *(Date to be confirmed)*

At the Annual Update, the San Diego Superior Court Probate Judges and Probate Court Staff present an overview of changes in the laws and rules affecting our practices for the new year.

Ove the past years, the Annual Update has been attended by approximately 350 people. Due to the expected high number of attendees, we anticipate that the Annual Update will be held virtually via Zoom.

EVENT SPONSOR

\$2,500

(Limited to One)

- Five (5) tickets to event
- Exclusive logo and name recognition on promotional emails and CLE advertisements
- Three (3) marketing slides displayed in rotation while attendees log in²
- Brief speaking opportunity during event opening remarks
- May provide up to three (3) Opportunity Drawing to attendees^{2,6}
- Logo recognition on PASD homepage and sponsor page with hyperlink
- Verbal recognition at beginning and conclusion of event
- Marketing flyer or brochure to be distributed to attendees^{2,3}



THANK YOU FOR MAKING A DIFFERENCE!



In supporting PASD, you support
PASD's work in our community

Please contact Joanne Briggs, Cabot Taylor or Monique Matosian-Bharucha to further discuss the sponsorship opportunities outlined above.

Joanne Briggs & Cabot Taylor
PASD Administrators
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Monique Matosian-Bharucha
Chair of Sponsorship Committee
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GENERAL NOTES ABOUT SPONSORSHIPS

- 1 In general, Networking Reception Sponsorships are separate sponsorship opportunities from CLE Sponsorships; however, the Networking Reception Event Sponsorship for a given month also includes that month's Monthly Education sponsorship.
- 2 Subject to PASD approval.
- 3 Marketing flyer/brochure to be distributed electronically with CLE materials for Zoom meetings; hard copies may be distributed to all attendees at in-person meetings.
- 4 Networking Reception Event sponsorship includes Monthly Education sponsorship for same month at no additional cost.
- 5 Location of Exhibitor Table to be designated by PASD.
- 6 Opportunity drawings, promotional and/or marketing materials to be provided by Sponsor at Sponsor's cost.
- 7 Must commit to sponsorship by 7/22/2024.
- 8 Photographs do not include Event Sponsor logo.
- 9 Excludes Save the Date promotional communications.
- 10 Sponsorship must be confirmed on or before 9/08/2024.