



**Probate Attorneys of San Diego**

2025

SPONSORSHIP BROCHURE



Dear Supporters,

We are excited to introduce the Probate Attorneys of San Diego's (PASD) 2025 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 1400 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.

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.

**Please note that all sponsorships are subject to the PASD Exhibitor and Sponsor Rules which are attached here. Please review these carefully.**

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 our exciting work in the Probate community!

Yours sincerely,



Shannon N. Taylor  
*President*



Monique Matosian-Bharucha  
*Co-Chair of Sponsorship  
Committee*



Lori Bolander  
*Co-Chair of Sponsorship  
Committee*

# SEASON & MONTHLY EDUCATION MEETINGS

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Throughout 2025

Our monthly continuing education meetings occur throughout the year, typically on the third Wednesday of each month. During the 2025 Season, we anticipate hosting approximately one in-person meeting every quarter from 4-5 p.m. and followed by a Networking Reception. All other monthly education meetings will be held via Zoom.

~~SEASON EDUCATION SPONSOR~~ ~~\$7,500~~

**Filled by Prudent Investors**

*(Limited to One)*

- ~~• Two (2) complimentary tickets to each CLE meeting in 2025 Season (please discuss any additional attendees with PASD Sponsorship Chair)~~
- ~~• Brief speaking opportunity (i.e. informational presentation) at start of each CLE meeting~~
- ~~• Two (2) marketing slides displayed in rotation before CLE meetings~~
- ~~• Exhibitor Table at in-person CLE meetings~~
- ~~• Prominent logo recognition on promotional emails for CLE meetings with hyperlink (promotional emails may also promote Networking Reception sponsor(s))~~
- ~~• Logo and name recognition on PASD homepage and sponsor page with hyperlink for 2025 season~~
- ~~• Verbal recognition at each 2025 monthly CLE meeting~~
- ~~• Marketing flyer or brochure to be distributed to attendees~~

MONTHLY EDUCATION SPONSOR

~~\$600/in person meeting~~

~~\$350/online meeting~~

*(One Monthly Education Sponsor per CLE meeting)*

**June 18, 2025 filled by Valerie Medina, Trust Properties USA**

**July and November available**

- One (1) complimentary ticket to sponsored CLE meeting
- Brief (1-2 min) speaking opportunity at start of in-person or online sponsored CLE meeting
- One (1) marketing slide displayed in rotation before sponsored CLE meeting
- ~~• Exhibitor Table at in-person CLE meetings~~
- Secondary logo recognition on promotional emails for sponsored CLE meeting
- Verbal recognition at sponsored CLE meeting
- Marketing flyer or brochure to be electronically distributed to attendees

## NETWORKING RECEPTIONS

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~~March 19, 2025, May 28, 2025, August 20, 2025, October 15, 2025~~

Our 2025 Networking Receptions will immediately follow the in-person monthly CLE meeting and will include hosted drinks and light appetizers. Networking Receptions are open to all CLE attendees and last for 1-1.5 hours.

**March 19, 2025 filled by Aspiriant**

**May 28, 2025 filled by First American Trust**

**August 20, 2025 filled by First American Trust**

**October 15, 2025 filled by Maria Corbisiero, Dream Homes Team with Compass**

**Event Sponsor must commit and pay within one month prior to event to secure sole sponsorship. Exhibitor Sponsorships only available if there is no Event Sponsor.**

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### EVENT SPONSOR

**\$2,000/Event**  
*(Four Available)*

- ~~Event Sponsor is sole sponsor of Networking Reception and sole Monthly Education sponsor for the preceding CLE and no other exhibitors will be permitted so the focus is solely on you and your business~~
- ~~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~~
- ~~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 Reception~~
- ~~Logo and name recognition on PASD homepage and sponsor page with hyperlink~~
- ~~Marketing flyer or brochure may be distributed at Networking Reception~~
- ~~If one sponsor accepts to be the sole Event Sponsor for all Networking Receptions (at \$6,000), sponsor's logo with hyperlink will be sent with all CLE marketing emails, even if no networking reception to occur during the month~~

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### EXHIBITOR *(subject to availability)*

**\$500/Event**

#### **EXHIBITOR SPONSORSHIP ONLY AVAILABLE IF THERE IS NO EVENT SPONSOR**

- ~~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 exhibitor(s))~~
- ~~Logo and name recognition on PASD sponsor page with hyperlink~~
- ~~May provide up one (1) Opportunity Drawing~~

**Both Event and Exhibitor Sponsorships include Exhibitor Table and Verbal Recognition**

# MEMBERSHIP MIXER

June 5, 2025, 5:00 p.m. – 8:00 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. Approximately 100-120 attendees expected. All photos by Terri Rippee.*



Photography by Terri Rippee

## EVENT SPONSOR

\$4,500 - \$5,500

**Filled by Merrill Lynch Special Needs Team**

*(One Available)*

- ~~\$5,500 Exclusive 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~~
- ~~\$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~~
- ~~Event Sponsorship Benefits for either \$4,500 or \$5,500 sponsorship~~
  - ~~Up to four (4) tickets to non-PASD members~~
  - ~~3-minute speaking opportunity during Mixer~~
  - ~~Verbal recognition during Mixer~~
  - ~~Name recognition and hyperlink to Sponsor's website on event registration page~~
  - ~~Logo and name recognition on PASD homepage and sponsor page with hyperlink for 2025 season~~
  - ~~Promotional and/or marketing materials may be provided to attendees~~
  - ~~Inclusion of logo on event photographs~~



Photography by Terri Rippee

## OPPORTUNITY DRAWING SPONSOR

\$300

### Filled by:

- **Maria Corbisiero, Dream Homes Team with Compass**
- **Winward Life Care**

*(Four of Six Available as of April 29, 2025)*

### **ONLY AVAILABLE IF THERE IS NO EXCLUSIVE EVENT SPONSOR** *(subject to availability)*

- Must provide one (1) Opportunity Drawing per sponsorship
- Name recognition on promotional emails for Mixer
- Verbal recognition at event
- Name recognition on “Sponsors” webpage of PASD website *(no hyperlink)*
- PASD may also provide Opportunity Drawings at PASD’s cost



Photography by Terri Rippee

# ANNUAL GALA (the “PROBATE PROM”)

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Friday, September 26, 2025, 6 p.m. to 10 p.m. *(date to be confirmed)*

*The 2025 Annual Gala (a.k.a the “Probate Prom”) will begin with a hosted Reception, followed by a served dinner, and capped off with our annual award, music and dancing. The Prom is historically attended by the Probate Judges and Probate Court Staff. Attendance is expected around 300. This event has been sold out for the last few years, and we anticipate another sell out this year.*



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## EVENT SPONSOR

\$7,500

**Filled by Merrill Lynch Special Needs Team and Trilogy Financial Services**

*(Two Available)*

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- Tickets for one (1) premiere reserved table *(total of 10 tickets)*
- Verbal recognition at Save the Date announcement at CLE meeting
- Exclusive logo and name recognition on Save the Date promotional emails and CLE advertisements
- 3-minute speaking opportunity during event
- May provide souvenir or opportunity drawing to attendees
- Premier Logo recognition on promotional emails and CLE advertisements for event
- Logo recognition on post-event email and web-based hyperlink to event photographs
- Logo recognition on PASD homepage and sponsor page with hyperlink for 2025 season
- Logo recognition in slide presentation during event *(minimum of 5x full-page slides per series)*
- Premier Logo recognition in printed event program
- Event sponsorship does not include logo on event photos *(see Photography Sponsorship for that opportunity)*

## STEP AND REPEAT SPONSOR

\$5,500

**Filled by Bellator Law Group, APC**

*(One Available)*

- Tickets for one (1) premiere reserved table *(total of 10 tickets)*
- Logo recognition on Step and Repeat backdrop
- May provide souvenir or opportunity drawing to attendees
- Secondary Logo recognition on promotional emails and CLE advertisements for event *(excludes logo recognition on save the date promotional emails)*
- Logo recognition on post-event email and web-based hyperlink to Step & Repeat photographs
- Logo recognition on PASD homepage and sponsor page with hyperlink for 2025
- Logo recognition in slide presentation during event *(minimum of 3x full page slides per series)*
- Secondary Logo recognition in printed event program

## RECEPTION SPONSOR

\$5,500

**Filled by Torrey Pines Bank**

*(One Available)*

- Tickets for one (1) premiere reserved table *(total of 10 tickets)*
- Logo recognition of Reception Sponsor during event *(details to be discussed with sponsor)*
- May provide souvenir or opportunity drawing to attendees
- Secondary Logo recognition on promotional emails and CLE advertisements for event *(excludes logo recognition on save the date promotional emails)*
- Logo recognition on PASD homepage and sponsor page with hyperlink for 2025
- Logo recognition in slide presentation during event *(minimum of 3x full page slides per series)*
- Secondary Logo recognition in printed event program

## BAND SPONSOR

\$5,500

**Filled by West Coast Resolution Group/National Conflict Resolution Center**

*(One Available)*

- Tickets for one (1) reserved table *(total of 10 tickets)*
- Logo recognition of Band Sponsor during event *(details to be discussed with sponsor)*
- May provide souvenir or opportunity drawing to attendees
- Secondary Logo recognition on promotional emails and CLE advertisements for event *(excludes logo recognition on save the date promotional emails)*
- Logo recognition on PASD homepage and sponsor page with hyperlink for 2025
- Logo recognition in slide presentation during event *(minimum of 3x full page slides per series)*
- Secondary Logo recognition in printed event program



Photography by Cece Canton



**PHOTOGRAPHY SPONSOR**

**\$4,000**

**Filled by Bolander Gallagher Smedley, LLP**

*(One Available)*

- 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 *(excludes logo recognition on save the date promotional emails)*
- May provide souvenir or opportunity drawing to attendees
- Logo recognition on PASD sponsor page with hyperlink for 2025
- Logo recognition in slide presentation during event *(minimum of 2x full page slide per series)*
- Logo recognition in printed event program



Photography by Cece Canton and Terri Rippee

## WINE SPONSOR

\$2,500

Filled by RMO LLP

(Two Available)

- 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
- Logo recognition on PASD sponsor page with hyperlink for 2025
- Logo recognition in slide presentation during event (*minimum of 2x 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

**DIAMOND, PLATINUM & GOLD SPONSORSHIPS DO NOT INCLUDE VERBAL RECOGNITION**



# ANNUAL SYMPOSIUM

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Friday, December 5, 2025 *(Date subject to change)*

*The Annual Symposium is a day-long in-person 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). Attended by approximately 150 people.*

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## EVENT SPONSOR

\$4,000

**Filled by First American Trust**

*(One Available)*

- ~~One (1) marketing slide at September or November monthly CLE meeting~~
- ~~Exclusive 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~~
- ~~Three (3) marketing slides displayed in rotation during certain event breaks~~
- ~~May provide promotional and/or marketing materials to attendees~~
- ~~Logo and name recognition on PASD homepage and sponsor page with hyperlink for 2025 season~~

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## EXHIBITOR

\$750

**Filled by :**

- **Merrill Lynch Special Needs Team**
- **Valerie Medina, Trust Properties USA**
- **Cal Private Bank**
- **Maria Corbisiero, Dream Homes Team**
- **Winward Life Care**

**Email to be added to Wait List if Additional Tables Become Available**

*(Five Available)*

- ~~One (1) ticket to attend event (includes one meal)~~
- ~~Exhibitor Table~~
- ~~May provide one (1) Opportunity Drawing to attendees~~
- ~~One (1) marketing slide displayed in rotation during certain event breaks~~
- ~~May provide promotional and/or marketing materials to attendees to attendees who visit Exhibitor Table~~

# ANNUAL UPDATE

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January 2026 *(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 volume of attendees, we anticipate that the Annual Update will be held virtually via Zoom.*

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EVENT SPONSOR

\$1,500

**Filled by Trust Properties USA**

*(One Available)*

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- ~~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 in~~
- ~~Brief speaking opportunity during event opening remarks~~
- ~~May provide up to three (3) Opportunity Drawing to attendees~~
- ~~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~~
- ~~Must commit to sponsorship by November 3, 2025~~



# 2026-2027 PROBATE HANDBOOK

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Release Date: December 5, 2025

*Sponsoring the 2026-2027 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.*

*Printed reference copies of the Handbook are available in the Probate Business Office and in all San Diego County Law Libraries. In addition, all 400+ PASD Members receive a digital copy of the Handbook on a thumb drive (the "Probate Pill").*

## PUBLICATION SPONSOR

\$5,000

*(Three (3) available)*

- 
- Logo recognition (*limited to 3 colors*) on thumb drive
  - Full page color advertisement and beginning of Probate Handbook
  - Logo and name recognition on title page of Probate Handbook
  - Logo recognition on PASD website with hyperlink from December 2025 to November of 2027
  - Verbal recognition of Publication Sponsor at publication launch at 2025 Annual Symposium and at January 2026 Annual Update
  - Two marketing slides displayed in rotation at 2025 Annual Symposium and at January 2026 Annual Update
  - Exhibitor Table at 2025 Annual Symposium
  - May provide up to one opportunity drawing at 2025 Annual Symposium

## 2026-2027 PROBATE HANDBOOK

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### FULL PAGE

\$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 2025 to December 2026
- Full page advertisement of Platinum Handbook Sponsor in the 2026-2027 Probate Handbook (*black & white only in printed materials*)
- Logo recognition of Platinum Sponsor in the 2026-2027 Probate Handbook

### HALF PAGE

\$1,250

- Half page advertisement of Sapphire Handbook Sponsor in the 2026-2027 Probate Handbook (*black & white only in printed materials*)
- Logo recognition of Sapphire Handbook Sponsor in the 2026-2027 Probate Handbook

### QUARTER PAGE

\$750

- Quarter page advertisement of Gold Handbook Sponsor in the 2026-2027 Probate Handbook (*black & white only in printed materials*)
- Logo recognition of Gold Handbook Sponsor in the 2026-2027 Probate Handbook



*Thank you for your interest in supporting PASD and our valuable work within San Diego's Probate community.*

*Please contact the **PASD Administrator** or one of the Co-Chairs to further discuss the sponsorship opportunities outlined above.*

***Please review the PASD Exhibitor and Sponsor Rules.***

**PASD Administrator**

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**Monique Matosian-Bharucha**

*Co-chair of Sponsorship Committee*

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**Lori Bolander**

*Co-chair of Sponsorship Committee*

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[\*\*https://pasd.memberclicks.net//\*\*](https://pasd.memberclicks.net//)



**ALL SPONSORSHIPS ARE SUBJECT TO THE PASD EXHIBITOR AND SPONSOR RULES, WHICH ARE ATTACHED HERETO AND INCLUDED BY REFERENCE HEREIN. FAILURE TO COMPLY WITH THE TERMS MAY RESULT IN LOSS OF SPONSORSHIP OR EXHIBITOR PRIVILEGES AND FUTURE SPONSORSHIP OPPORTUNITIES.**



## **EXHIBITOR AND SPONSOR RULES**

*Updated January 2025 and subject to change.*

Exhibitions and sponsorships are permitted at the sole discretion of Probate Attorneys of San Diego (herein "PASD"). PASD strives to create an inclusive, respectful, and fun environment at events, which is conducive to learning and civility amongst the probate bar and all individuals and entities involved with the probate bar. **BY AGREEING TO BE AN EXHIBITOR AT, OR A SPONSOR OF, ANY EVENT HOSTED BY PASD, THE EXHIBITOR AND/OR SPONSOR AGREES TO FOLLOW THE RULES FOR EXHIBITORS AND SPONSORS SET FORTH HEREIN.** PASD reserves the right to remove any exhibitor or sponsor that fails to follow the rules for exhibitors and sponsors, and the right to refuse any exhibitor or sponsor in future events, in the discretion of PASD.

1. Exhibitors and sponsors agree to be respectful of all rules of the venue hosting any event, and respectful to all others at the event.
2. During an event, each exhibitor or sponsor booth/space must be staffed by a representative of the exhibitor or sponsor, provided, however that an individual exhibitor/sponsor may leave the booth/space during a meal. Exhibitors/sponsors representatives must be an employee or agent of the sponsor/exhibitor. Exhibitor table location shall be designated by PASD.
3. Exhibitors and sponsors must confine demonstrations or other promotional activities within the limits of their assigned space at an event.
4. Exhibitors and sponsors may not use sound equipment in their promotional activities unless having first obtained written approval from a PASD representative prior to an event.
5. Exhibitors and sponsors are required to arrange displays, demonstrations, and audio-visual presentations to ensure compliance with all venue regulations and local fire and safety laws.
6. Exhibitor and sponsors may offer marketing brochures and promotional items to attendees, provided such marketing brochures and promotional items are equally offered to all attendees, and only promoted within an exhibitor's or sponsor's assigned space.
7. If Opportunity Drawing available, exhibitors and sponsors may only offer (an) Opportunity Drawing(s) as specified in the PASD Sponsorship Brochure, at sponsor's cost and must obtain the written approval of the items to be provided in such Opportunity Drawing(s) from a PASD representative prior to the event. If Opportunity Drawing is available, no other drawings may be held at the event. Collection of information form attendees for later drawings is permitted and must be confined to exhibitor's or sponsor's assigned space.
8. Exhibitors and sponsors are responsible for the security and storage of all items brought to an event, including any prizes or promotional materials.
9. Exhibitors and sponsors shall be dressed in business attire and are expected to conduct themselves in a professional manner at all times during the event.



## **EXHIBITOR AND SPONSOR RULES CONTINUED**

*Updated January 2025 and subject to change.*

10. Exhibitors or sponsors may not use helium balloons. Cold air balloons are permitted with written approval from a PASD representative.
11. Exhibitors and sponsors may not use overhead roofs, tents, canopies, or carpet across aisles.
12. Exhibitors and sponsors may not cement, nail, tack, tape or attach any material to any floor, wall, or column unless approved in advance in writing by a representative of PASD.
13. Exhibitors and sponsors may not serve any food or beverage at their space without permission from a representative of PASD. Acceptable food items are limited to professionally pre-packaged food items.
14. Exhibitors and sponsors shall not photograph or videotape the exhibit or product of another exhibitor or sponsor without permission from that exhibitor or sponsor.
15. Persons under the age of eighteen (18) are not permitted in the event areas at any time during the event.
16. Other than certified service animals, animals are not permitted in the event areas at any time during the event. Certified service animals must be under the owner's control at all times.
17. Exhibitors and sponsors shall be entitled to the number of tickets as provided in the PASD Sponsorship Brochure, and PASD may provide a corresponding number of meals for the exhibitor/sponsor. To the extent meals are so provided, PASD shall accommodate special dietary requests of an exhibitor/sponsor insofar as the venue is able to do so; if, however, the venue is unable to accommodate an exhibitor's/sponsor's special dietary requests, there shall be no reduction in the cost of the exhibitorship/sponsorship.
18. PASD is not responsible for logos that do not print well or that display unclearly in slideshows.