

Estate Planning Council of Central Texas

Sponsorship Policy

Adopted July 28, 2022

The Board of Directors ("Board") of the Estate Planning Council of Central Texas ("Council") desires to implement the following policies regarding sponsorships. These policies are not amendments to the Council's Amended and Restated Bylaws ("Bylaws") but serve to supplement such Bylaws with additional detail.

I. Structure and Universal Details

- a. There will be four levels of sponsorship: **Individual, Supporter, Sponsor, and Patron.**
- b. Every sponsor will be listed on the website; higher levels of sponsors will be given more prominent placement on the website and other materials.
- c. Sponsorship opportunities are offered on a first-come-first-served basis, however, there is no limit on the number of Individual Sponsorships.
- d. A minimum of one social (April) and a maximum of three socials (August, December, and April) will be held in any given Program Year.
- e. A list of attendees (each attendee's name and organization, if one is provided by the member, only) will be provided to every sponsor after any sponsored event.
- f. Any credit card fees will be passed through to the sponsor.

II. Individual Sponsors

- a. Cost: For the 2022 –2023 Program Year that amount is **\$750.**
- b. **Includes membership dues for one member.**
- c. **Only members** who are individuals or sole proprietors may be Individual Sponsors.
- d. The **name of the member or the member's organization** (and not a logo) will be included on the **website and the pre-meeting sign or PowerPoint.**

III. Supporters

- a. Cost: For the 2022 – 2023 Program Year that amount is **\$1000.**

- b. **Organizations with or without members** may be Supporters.
- c. The **logo or name of the organization** will be included on the website, on the pre-meeting sign or PowerPoint, and on **any emails or other materials relating to the event sponsored by the sponsor**.
- d. Supporters **may sponsor a social** if they wish. The **sponsor must fully plan and pay for the social** and there is no limit on the number of non-member attendees at the social.

IV. Sponsors

- a. Cost: For the 2022 - 2023 Program Year that amount is **\$4,000**.
- b. Organizations **with or without members** may be Sponsors.
- c. The **logo or name of the organization** will be included on the website, on the pre-meeting sign or PowerPoint, and on **any emails or other materials relating to the event sponsored by the sponsor**.
- d. Sponsors may sponsor a **lunch meeting or a social** and may distribute materials to the attendees if they wish.
- e. If sponsoring a **lunch**: The sponsor may make a **three-minute presentation** to introduce the organization at the sponsored meeting. **Two non-members** may attend the sponsored lunch.
- f. If sponsoring a **social**: The sponsor **may plan and pay for** the social, in which case there is no limit on the number of non-member attendees or on the length of a pre-social presentation. If the sponsor **elects for the Council to plan and pay for the social**, **two non-members** may attend the sponsored social and the sponsor will be provided a three-minute introduction slot if they desire.

V. Patrons

- a. Cost: For the 2022 – 2023 Program Year that amount is **\$7,000**.
- b. Organizations **with or without members** may be Patron Sponsors.
- c. The logo or name of the organization will be included on the **Council's homepage and all emails and materials of the Council for that program year** (August through July) that are sent to the membership.
- d. Patrons may sponsor the **dinner meeting, a lunch meeting, or a social**.

- e. If sponsoring a **lunch or dinner**: The sponsor may make a **five-minute presentation** to introduce the organization at the sponsored meeting. **Five non-members** may attend the sponsored lunch.

- f. If sponsoring a **social**: The sponsor **may plan and pay for** the social, in which case there is no limit on the number of non-member attendees or on the length of a pre-social presentation. If the sponsor **elects for the Council to plan and pay for the social**, a maximum of **five non-members** may attend the sponsored social and the sponsor will be provided a five-minute introduction slot, if they desire.