



Probate Attorneys of San Diego

2019

SPONSORSHIP OPPORTUNITIES

PASD, the bar association for San Diego's Probate community, is pleased to offer multiple opportunities for you to sponsor our events and programs and thereby raise the awareness of PASD's members as to your company or business, and the services you may provide to San Diego probate attorneys and other professionals or businesses closely connected with the Probate community. PASD has an active mailing list of over 700 people. We are open to discussing other sponsorship opportunities with you if none of the following options meet your needs.

NOTABLE ANNUAL EVENTS

Monthly Education Programs. Each month, PASD presents a relevant topic over the lunch hour, or in the evening using speakers who are informed on the relevant topic. Attendees receive valuable information as well as continuing education credit. Typically, between 100 and 125 members attend each program event.

Membership Mixer. Usually held in June or July, this event is an appreciation/networking mixer held at a local restaurant and allows the members to connect with each other in an informal setting as well as meet the PASD Directors. This event is typically attended by approximately 50 to 75 people.

Annual Awards Dinner ("Probate Prom"). Usually held in October or November each year; this is a dinner dance event where the PASD members can enjoy good food, music, drinks and dance away their concerns. In the past, the Probate Judges have taken the opportunity at this event to recognize a worthy PASD member for his or her outstanding service to the Probate community and presented the member with the annual Judges' Award. Attendance at this event is between 250 and 300 people.

Court Appointed Attorney Training. Usually held in December, this is an annual event and provides the attendees with 6 hours of continuing education credit. Various topics are presented by multiple speakers on the subjects of Conservatorships and Guardianships. Court-appointed attorneys are encouraged to attend so they have up-to-date information about Court procedures and rules related to the difficult task of acting as a court-appointed attorney for a Conservatee or Ward. This event is usually attended by over 100 people.

Judges/Examiners Annual Update. This 2-3 hour event will be held at the beginning of the 2020 calendar year. The Probate Judges and Probate Examiners enlighten probate attorneys, fiduciaries or other interested persons of the 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. Breakfast is served and over 250 persons attend this event.

Probate Handbook. Every two years, PASD updates and publishes the *Probate Handbook for Executors, Administrators and Personal Representatives*. The Probate Handbook was compiled by PASD and each of the chapters were authored and edited by esteemed attorneys within the local community of probate practitioners. The Handbook is a valuable resource during the administration of a probate for use by self-represented parties, new attorneys and/or attorneys who do not customarily practice in the San Diego Probate Court. Each member of PASD receives a digital copy of the updated Probate Handbook. Digital or paper copies of the Handbook can be purchased by members of the public for a fee.

California Conference of Bar Associations. Every year, delegates from various legal bar associations attend to discuss and implement proposed new legislation potentially affecting probate attorneys. PASD's delegation continues to successfully propose legislative amendments for consideration at this annual conference. This sponsorship helps defray the cost of the PASD delegates attending the annual conference and pay for the annual PASD t-shirt that is proudly worn at the conference. Annually, PASD creates a t-shirt for its members that sports a fun saying related to the practice of probate.

Event: **MONTHLY CONTINUING EDUCATION PROGRAMS**

Date: Varies – see below.

2019 Event Sponsor:

Withersworldwide

Lunches are usually held on the third Wednesday of every month. Evening programs are presented after work for 1 to 3 hours. You may choose to sponsor some or all of the programs for the year. Program Sponsors will be limited to two sponsors for each event.

Sponsorship Levels:

- ◆ **Season Sponsor** \$4,500 for entire season (typically 9 programs)
- ◆ **Program Sponsor** \$500 for each monthly program

Benefits of Seasonal Sponsorship:

- ◆ (1) ticket for each event sponsored
- ◆ Announcement as Sponsor at each Event
- ◆ Banner Displayed if Supplied by Sponsor
- ◆ Recognition on PASD website with hyperlink to Sponsor's website
- ◆ Exhibitor's Table Set-up
- ◆ Ability to provide written or other marketing materials to each member (subject to PASD approval) at each Event

Benefits of One Program Sponsorship:

- ◆ (1) ticket for each Event sponsored
- ◆ Announcement of Sponsorship at Event
- ◆ Exhibitor's Table Set-up
- ◆ Ability to provide written or other marketing materials to each member (subject to PASD approval) at sponsored Event

PROBATE ATTORNEYS OF SAN DIEGO

1550 HOTEL CIRCLE NORTH, SUITE 300, SAN DIEGO, CALIFORNIA 92108

2019 Programs:

- January 16, 2019 *Bias Program.* Speakers: Dr. Valerie Rice
- February 20, 2019 *Decanting Trusts.* Speakers: Jenny Bratt & Catherine Swafford, Esq.
- March 20, 2019 *Probate Appeals.* Speakers: Ed Silverman (Appellate Court Staff Attorney) and Attorney Charles Bird
- April 17, 2019 *The Unduly Influenced Litigant.* Speaker: Adam Streisand
- May 15, 2019 *Avoiding Estate Planning Pitfalls.* Speaker: Vivian Thoreen
- June 19, 2019 *Banking Issues in Probate and Trust Administration.* Speakers: Brenda Riley (Union Bank) and Cindy Lehman (California Bank & Trust)
- July 17, 2019 *How Can I Dance with Another When I Saw No Standing There (Probate Laches).* Speaker: Patrick Brown and Julie Woods
- August 14, 2019 *Enforcement of Judgments and Collection Issues in Probate.* Speaker: Miles Grant, Esq.
- Sept. 18, 2019 *California No-Contest Clause Meets SLAPP Motion.* Speaker: Hon. Glen H. Reiser
- Nov. 13, 2019 *Motion Work in Probate.* Speaker: Nadia Keilani, Probate Court Research Attorney
- February 2020 *Evening Litigation Program.* Speakers: Judge Carolyn Caietti & Judge Robert Trentacosta

(Programs and Dates are Subject to Change.)

Please Note: *Evening Litigation Program postponed to February 2020*

Event: **MEMBERSHIP MIXER**

Date: Thursday, June 20, 2019

2019 Event Sponsor:

The Special Needs Team at Merrill Lynch

Usually held in June or July, this event is an appreciation mixer held at a local restaurant, but has grown to be a great networking opportunity as well by allowing the members to connect with each other as well as meet the PASD Directors. This year the Membership Mixer will again be held at Gordon Biersch's Brewery restaurant in Mission Valley. Each member will be treated to a free drink and be able to mingle and speak with fellow members in an informal cocktail atmosphere. Typically attended by approximately 50 to 75 people.

Sponsorship Levels:

Event Sponsor

\$2,000 *(limited to 1 Event Sponsor - committed)*

Benefits of Sponsorship:

- ◆ Announcement of Sponsorship at Event
- ◆ Recognition on PASD website with hyperlink to Sponsor's website
- ◆ Ability to provide written or other marketing materials to each member (subject to PASD approval)

Event: **ANNUAL AWARDS DINNER**

Date: Friday, October 25, 2019

2019 Event Sponsors:

***HearthStone /
Private Wealth Management***

***The Special Needs Team
at Merrill Lynch***

The Annual Awards Dinner (a.k.a the “Probate Prom”) will be held at the DoubleTree Hotel in Mission Valley. A No-Host Bar and Dinner will be served. Usually all the Probate Judges and several of the Probate Court staff attend. Historically, the Judges recognize a member of PASD for his or her commitment to the probate community. Entertainment is provided during the Event. Usually over 200 people attend this event.

Sponsorship Levels:

- ◆ **Event Sponsor** \$5,000 *(limited to 2 Event Sponsors - committed)*
Benefits of Sponsorship:
 - ◆ Premiere Reserved Table (10) seats
 - ◆ Inclusion as Sponsor on Invitations (if committed by 8-1-2019)
 - ◆ Event Announcement of Sponsorship
 - ◆ Recognition in Event Program
 - ◆ Recognition on PASD website with hyperlink to Sponsor’s website
 - ◆ Display of Sponsor Name/Logo
 - ◆ Ability to provide written or other marketing materials to each member (subject to PASD approval)

- ◆ **Platinum Sponsor** \$2,500
Benefits of Sponsorship:
 - ◆ Reserved Table (10) seats
 - ◆ Recognition in Event Program
 - ◆ Recognition on PASD website
 - ◆ Display of Sponsor Name/Logo

- ◆ **Gold Sponsor** \$1,250
Benefits of Sponsorship:
 - ◆ (4) tickets to attend the Event
 - ◆ Recognition in Event Program
 - ◆ Recognition on PASD website
 - ◆ Display of Sponsor Name/Logo

- ◆ **Silver Sponsor** \$750
Benefits of Sponsorship:
 - ◆ (2) tickets to attend the Event
 - ◆ Recognition in Event Program
 - ◆ Recognition in PASD website
 - ◆ Display of Sponsor Name/Logo

- ◆ **Diamond Host Sponsor** \$2,000
Sponsorship of Entertainment, Music or Reception
Benefits of Sponsorship:
 - ◆ Recognition in Event Program
 - ◆ Recognition at Area Sponsored
 - ◆ Recognition on PASD website
 - ◆ Display of Sponsor Name/Logo

- ◆ **Sapphire Host Sponsor** \$1,000
Sponsorship of Table Wine or Programs (*limited to 2 Table Wine Sponsors - committed*)
Benefits of Sponsorship:
 - ◆ Recognition in Event Program
 - ◆ Recognition at Area Sponsored
 - ◆ Recognition on PASD website
 - ◆ Display of Sponsor Name/Logo

- ◆ **Ruby Host Sponsor** \$500
Sponsorship of Table Decorations, Room Decorations or PASD Patron
Benefits of Sponsorship:
 - ◆ Recognition in Event Program
 - ◆ Recognition on PASD website
 - ◆ Display of Sponsor Name/Logo

Event: ANNUAL COURT-APPOINTED ATTORNEY TRAINING

Date: December 6, 2019

This event provides attendees with 6 hours of continuing education credit. Various topics are presented by multiple speakers, including the Probate Judges, on the subjects of Conservatorships and Guardianships. Topics 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. This event is usually attended by over 100 interested persons. This year the Court Appointed Attorney Training will be held at the Handlery Hotel in Mission Valley.

Sponsorship Levels:

◆ **Event Sponsor**

\$2,500 *(limited to 1 Event Sponsor)*

Benefits of Sponsorship:

- ◆ Event Announcement of Sponsorship
- ◆ Recognition as Sponsor in Program
- ◆ Recognition on PASD website with hyperlink to Sponsor's website
- ◆ Ability to provide written or other marketing materials to each member (subject to PASD approval)
- ◆ Exhibitor's Table Set-up
- ◆ Table Banner Displayed if Supplied

◆ **Exhibitor**

\$750

Benefits of Sponsorship:

- ◆ Event Announcement of Sponsorship
- ◆ Recognition as Sponsor in Program
- ◆ Exhibitor's Table Set-up
- ◆ Table Banner Displayed if Supplied

Event: **ANNUAL JUDGES/EXAMINERS UPDATE**

Date: January 9, 2020

2019 Event Sponsors:

CPT Institute

Prudent Investors Network

This year, the Judges Annual Update will be held at the DoubleTree Hotel in Mission Valley. For 2-3 hours, the Probate Judges and Probate Examiners enlighten probate attorneys, fiduciaries or other interested persons of the 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. Breakfast is served and typically over 250 persons attend this event.

Sponsorship Levels:

- ◆ **Event Sponsor** \$2,500 *(limited to 2 Event Sponsors - committed)*
 - Benefits of Sponsorship:
 - ◆ (4) tickets to attend the Event
 - ◆ Event Announcement of Sponsorship
 - ◆ Recognition as Sponsor in Program
 - ◆ Recognition on PASD website with hyperlink to Sponsor's website
 - ◆ Ability to provide written or other marketing materials to each member (subject to PASD approval)
 - ◆ Exhibitor's Table Set-up
 - ◆ Table Banner Displayed if Supplied

- ◆ **Exhibitor** \$750
 - Benefits of Sponsorship:
 - ◆ (1) ticket to attend the Event
 - ◆ Recognition as Sponsor in Program
 - ◆ Exhibitor's Table Set-up
 - ◆ Table Banner Displayed if Supplied

Opportunity: **2020-2021 PROBATE HANDBOOK**

Sponsoring the 2020-2021 Probate Handbook is a unique marketing opportunity that provides sponsors with 2 years of repeated exposure to a large audience of probate professionals. Every 2 years, PASD updates the Handbook to reflect current best practice by calling upon highly experienced local practitioners to expand on each stage of a probate. The 2020-2021 Handbook is expected to be released in December 2019.

PASD created the Handbook to offer hands-on guidance to those navigating a probate in San Diego, by bridging the gap between the governing laws and rules and “everyday” policies and procedures. Each of the 40+ chapters focuses on a particular topic or step within probate proceedings, discusses common issues and provides generalized instruction, practice tips, examples and “best practices.”

The Probate Handbook is an indispensable probate resource in San Diego County. The Probate Judges and Probate Business Office (court staff) use the Probate Handbook and refer pro pers to use it as a resource. Copies are available in all the County Law Libraries, and practitioners outside of San Diego also use it. In addition, all 250+ PASD Members receive a digital copy of the Handbook (the “Probate Pill”), and can access it on the PASD website.



Sponsorship Levels:

◆ **Publication Sponsor**

\$5,000 (*limited to 2 Sponsors*)

Benefits of Sponsorship:



- ◆ Sponsor’s name/logo* on outside of Thumbdrive (a.k.a. the “Probate Pill”) for 2 years
- ◆ Recognition on PASD’s website with hyperlink to Sponsor’s website for 2 years
- ◆ Full page advertisement** in the Probate Handbook for 2 years
- ◆ Additional exposure within the Probate Handbook for 2 years

* *limited to 3 colors*

** *limited to black & white*

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- ◆ **Platinum Sponsor** \$2,500
Benefits of Sponsorship:
 - ◆ Recognition on PASD’s website with hyperlink to Sponsor’s website for 2 years
 - ◆ Half page advertisement** in the Probate Handbook for 2 years
 - ◆ Additional exposure within the Probate Handbook for 2 years

*** limited to black & white*

- ◆ **Gold Sponsor** \$1,250
Benefits of Sponsorship:
 - ◆ Quarter page advertisement** in the Probate Handbook for 2 years
 - ◆ Additional exposure within the Probate Handbook for 2 years

*** limited to black & white*

- ◆ **Silver Sponsor** \$750
Benefits of Sponsorship:
 - ◆ Business card sized advertisement** in the Probate Handbook for 2 years
 - ◆ Additional exposure within the Probate Handbook for 2 years

*** limited to black & white*

- ◆ **Sustaining Sponsor** \$250
Benefits of Sponsorship:
 - ◆ Name listed alphabetically under “Sustaining Sponsors” in the Probate Handbook for 2 years

Event: **CALIFORNIA CONFERENCE OF BAR ASSOCIATIONS**

Date: Calendar Year 2019

Every year, delegates from California legal bar associations, including civil litigation, probate, diversity groups and everything in between, gather to share ideas and caucus regarding possible new legislation. This conference attracts over 300 people from all throughout California.

PASD delegates attend to discuss and implement proposed new legislation potentially affecting probate attorneys. PASD's delegation continues to successfully propose legislative amendments for consideration at this annual conference. This sponsorship helps defray the cost of the PASD delegates attending the annual conference. The sponsor of this event will receive state wide exposure to every bar association that attends.

Each year, PASD also creates a t-shirt that proudly displays an appropriate or amusing adage related to the practice of probate law and each delegate wears the T-shirt during the conference. Sponsors may provide a black & white name or logo that will be placed on the front or back of each t-shirt. T-shirts are available for purchase by the public or members on PASD's website. T-Shirt Sponsors will also receive recognition on PASD's website.

Past T-Shirt Slogans:

2017 Slogan: *Nothing Says Fun Like Probate*

2018 Slogan: *Where There's a Will, There's a Disgruntled Heir*

2019 Slogan: *TBC*

Sponsorship Levels:

◆ **Event Sponsors**

\$1,000 to \$15,000

Benefits of Sponsorship:

- ◆ Recognition on PASD's website
- ◆ Company Name or Logo Placement on PASD's annual t-shirt
- ◆ Recognition on PASD's website with hyperlink to Sponsor's website
- ◆ Statewide exposure to CCBA attendees