



Probate Attorneys of San Diego

2026

SPONSORSHIP BROCHURE



Dear Supporters,

We are excited to introduce the Probate Attorneys of San Diego's (PASD) 2026 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 450 members and approximately 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.

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 hereto. 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 meets your needs. Thank you for your interest in and support of our exciting work in the Probate community!

First come, first serve. Past sponsors have priority for sponsorships.

Yours sincerely,



Shannon N. Taylor
President



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



Lori Bolander
*Co-Chair of Sponsorship
Committee*

MONTHLY MCLE MEETINGS & NETWORKING RECEPTIONS

Throughout 2026

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

During the 2026 Season, we anticipate hosting three (3) in-person MCLE meetings, and five (5) online MCLE meetings between February and November.

In-person MCLE meetings typically are held between 4-5:15 p.m. and are immediately followed by a 1-hour Networking Reception. Networking Receptions include hosted drinks and light appetizers, and are open to all MCLE attendees.

Online MCLE meetings are via Zoom and typically are held between 12-1:15 pm.

SEASON MCLE SPONSOR

\$8,000

The Season MCLE Sponsor is the recognized sponsor of the 2026 Season's monthly MCLE meetings, whether held in-person or online

One Available

- Two (2) complimentary tickets to each MCLE meeting in 2026 Season (*please discuss any additional attendees with PASD Sponsorship Co-Chairs*)
- Brief speaking opportunity (i.e. informational presentation) at start of each MCLE meeting
- Two (2) marketing slides displayed in rotation before MCLE meetings
- Exhibitor Table at in-person MCLE meetings
- May provide up to three (3) Opportunity Drawings
- Prominent logo recognition on promotional emails for MCLE meetings with hyperlink (*promotional emails may also promote Monthly MCLE/Networking Reception sponsor*)
- Logo and name recognition on PASD homepage and sponsor page with hyperlink for 2026 season
- Verbal recognition at each 2026 monthly MCLE meeting
- Marketing flyer or brochure to be distributed to attendees

IN-PERSON CLE & RECEPTION SPONSOR

\$2,750/Event

The In-Person MCLE & Reception Sponsor is the sponsor of the in-person MCLE meeting and Networking Reception immediately following the MCLE meeting

One Sponsorship per In-Person MCLE Meeting | Three Available Throughout Year

- In person CLE and Reception Sponsor is sole sponsor of the Monthly In-Person CLE Meeting and the Reception that follows
- Logo and name recognition on promotional emails for CLE and Reception with hyperlink (*promotional emails may also promote Season CLE sponsor*)
- May provide up to three (3) Opportunity Drawings
- Five (5) tickets to monthly CLE and Reception
- Brief speaking opportunity (i.e. informational presentation) at start of CLE meeting
- Two (2) marketing slides displayed in rotation at beginning of CLE meeting immediately preceding Reception
- Exhibitor table at CLE meeting and Reception
- Logo and name recognition on PASD homepage and sponsor page with hyperlink
- Marketing flyer or brochure may be distributed at CLE meeting

ONLINE CLE SPONSOR

\$350/online meeting

The In-Person CLE & Reception Sponsor is the sponsor of the in-person CLE meeting and Networking Reception immediately following the CLE meeting

One Sponsorship per Online CLE Meeting | Five Available Throughout Year

- One (1) complimentary ticket to sponsored CLE meeting
- Brief speaking opportunity at start of in-person or online sponsored CLE meeting
- One (1) marketing slide displayed in rotation before sponsored CLE meeting
- 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

MEMBERSHIP MIXER

June 11, 2026, 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. Approximately 150 attendees expected. All photos by Terri Rippee.



Photography by Terri Rippee

EVENT SPONSOR

\$5,000

The Event Sponsor is the primary sponsor of the Membership Mixer

One Available

-
- Primary logo recognition on promotional emails for Mixer with hyperlink
 - Must provide at least one (1) and up to three (3) Opportunity Drawings
 - Up to four (4) tickets to non-PASD members
 - Brief speaking opportunity during Mixer
 - Verbal recognition during Mixer
 - Logo and name recognition on PASD homepage and sponsor page with hyperlink
 - Promotional and/or marketing materials may be provided to attendees
 - Inclusion of logo on event photographs



Photography by Terri Rippee

OPPORTUNITY DRAWING SPONSOR

\$150

*The Opportunity Drawing Sponsors provide Opportunity Drawings
at the Membership Mixer*

Six Available

- Must provide one (1) Opportunity Drawing per sponsorship
- 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”)

Friday, October 2, 2026, 5:30 p.m. to 10 p.m. *(date to be confirmed)*

The 2026 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 350. This event has been sold out for the last few years, and we anticipate another sell out this year.



EVENT SPONSOR

\$7,500

The Event Sponsors are the primary sponsors of the Probate Prom
Two Available

- Tickets for one (1) premiere reserved table *(total of 10 tickets)*
- Verbal recognition at Save the Date announcement at 2026 Membership Mixer
- Exclusive logo and name recognition on Save the Date promotional emails and event advertisements
- Brief speaking opportunity during event
- May provide souvenir or opportunity drawing to attendees
- Premier Logo recognition on promotional emails and event advertisements
- Logo recognition on post-event email and web-based hyperlink to event photographs
- Logo recognition on PASD homepage and sponsor page with hyperlink for 2026 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

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 2026
- 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

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 2026
- 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

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 2026
- 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 & Terri Rippee

PHOTOGRAPHY SPONSOR

\$5,500

One Available

- Ten (10) tickets together for Sponsor and their guests
- Logo recognition on candid photos of event
- Secondary Logo recognition on promotional emails and CLE advertisements for event (*excludes logo recognition on save the date promotional emails*)
- Primary 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 2026
- Logo recognition in slide presentation during event (*minimum of 3x full page slide per series*)
- Logo recognition in printed event program



Photography by Terri Rippee

WINE SPONSOR

\$3,000

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 2026
- Logo recognition in slide presentation during event (*minimum of 2x full page slides per series*)
- Logo recognition in printed event program

Availability of Diamond, Platinum, Gold & Silver Sponsorships are sold on a first, come, first serve basis, taking into account facility restrictions and limitations on capacity of the venue. We recommend that you advise us of your interest of a Diamond, Platinum, Gold or Silver Sponsorship prior to the Membership Mixer.

DIAMOND SPONSOR

\$3,000

- 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

\$2,000

- Six (6) tickets together at a 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

GOLD SPONSOR

\$1,500

- Four (4) tickets together at a 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

SILVER SPONSOR

\$750

- Two (2) tickets together at a 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

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



ANNUAL SYMPOSIUM

Friday, December 4, 2026 *(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.

EVENT SPONSOR

\$5,000

One Available

- One (1) marketing slide at September or November monthly MCLE meeting
- Exclusive logo and name recognition on promotional emails and event 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 2026 season

EXHIBITOR

\$1,000

Eight Available

- Two (2) tickets to attend event *(includes two meals; contact Sponsorship Committee chairs to discuss costs for additional tickets)*
- 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

January 2027 *(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 350-400 people. Due to the expected high volume of attendees, we anticipate that the Annual Update will be held virtually via Zoom.

EVENT SPONSOR

\$1,500

One Available

- 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 October 1, 2026



*Thank you for your interest in supporting PASD and our valuable work within
San Diego's Trust, Estate and 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.

**Christopher Simpson,
PASD Administrator**

(619) 929-2981

sdprobateattorneys@gmail.com

Monique Matosian-Bharucha

Co-chair of Sponsorship Committee

(619) 238-4873

mmatosian@swsslaw.com

Lori Bolander

Co-chair of Sponsorship Committee

(619) 223-1641

lori@lawgbs.com

<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 July 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. Exhibitors 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 is a sponsorship benefit, exhibitors and sponsors may only offer 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. No other drawings may be held at the event. Collection of information from 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 July 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.