



2026 SPONSORSHIP OPPORTUNITIES

JOIN LEADERS IN THE ESTATE PLANNING COMMUNITY



✉ sponsorship@naepc.org

🌐 naepc.org
estateplannersforum.org

2026 SPONSORSHIP

PATRON

Advancing Excellence in Estate Planning by
Supporting the Mission of NAEPC

ESTATE PLANNERS FORUM

Virtual Half-Day Events
May 12, 2026 & October 21, 2026

*Returning to
In-Person
Spring 2027*

WEBINAR SERIES

Enhancing the Delivery of High-Quality
Virtual Education

COUNCIL ACTIVITIES

Strengthening NAEPC-Affiliated Estate Planning
Councils with Essential Resources

Patron

\$15,000

Estate Planners
Forum

\$500 and
up

Webinar
Series

\$1,500

Council
Activities

\$1,500

ABOUT NAEPC



The National Association of Estate Planners & Councils (NAEPC) cultivates **EXCELLENCE IN ESTATE PLANNING** by serving estate planning councils and their credentialed members, delivering exceptional resources and unsurpassed education, and recognizing those who hold the Estate Planning Law Specialist certification.

We are a national network of over 2,300+ Accredited Estate Planner® designees and 265 affiliated estate planning councils and their 28,000 credentialed members, all focused on establishing and monitoring the highest professional and educational standards. Our shared belief is that the team approach to estate planning best serves the client.

GENERAL BENEFITS

- Exclusivity... only one patron is available
- Logo or your firm’s ad within the rotating slider on home page of naepc.org
- Logo / link in all issues of *NAEPC News* during 2026
- Logo / link on the *NAEPC Journal of Estate & Tax Planning* and all issue announcements during 2026

ACCREDITED ESTATE PLANNER DESIGNEE® VISIBILITY FOUR AEP® FORUM EVENTS

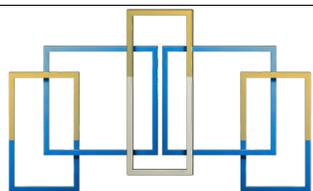
- Logo and link on all AEP Forum® event announcements during 2026 (at least two announcements per event)
- Verbal recognition during opening and closing remarks at each AEP Forum® event

2026 ESTATE PLANNERS FORUM VIRTUAL EVENTS

- Exclusive lead sponsor for both virtual conferences during 2026
- Most prominent logo and virtual exhibit hall placement for both events
- All sponsor and exhibitor benefits noted on next page
- Sponsor of NAEPC-planned “wellness moments” during each day
- Unlimited attendee registrations (including access to continuing education credit)
- Priority placement on the exhibit floor for the 2027 in-person Estate Planners Forum + a 10% discount on any level of support

	Distribution	Attendance		Annual Visitors
<i>NAEPC News</i>	36,000	n/a		
<i>NAEPC Journal of Estate & Tax Planning</i>	15,000	n/a	naepc.org	150,000
AEP® Forum Events	2,400	100 per event	estateplannersforum.org	33,000
Virtual Estate Planners Forum	16,000	500 per event		

VIRTUAL
MAY 12, 2026 & OCTOBER 21, 2026



ESTATE PLANNERS FORUM
THE MULTI-DISCIPLINARY COLLABORATIVE CONFERENCE

*Returning to
In-Person
Spring 2027*

SPONSOR

\$3,000 ONE CONFERENCE / \$5,000 BOTH CONFERENCES

Exhibitor benefits PLUS

- Pre-conference attendee list with email to promote your attendance at the event(s) chosen
- Logo in the virtual conference lobby
- Ten additional attendee registrations (including access to continuing education credit)
- Verbal recognition during opening remarks
- Logo / link on all conference-specific promotional messaging, on the conference website, and within *NAEPC News* and the *NAEPC Journal of Estate & Tax Planning* (including issue announcements)

EXHIBIT

\$1,250 ONE CONFERENCE / \$2,250 BOTH CONFERENCES

- Virtual exhibit booth within the online exhibit hall
- Five attendee registrations (including access to continuing education credit)
- Post-conference attendee list with email for one-time use for the event(s) chosen

SUPPORT

\$500 ONE CONFERENCE / \$800 BOTH CONFERENCES

- Firm name, logo, and link within the designed “Supporter” virtual exhibit booth

As our thank you, all sponsors and exhibitors will receive a 10% discount on any level of support for the 2027 in-person conference.

Please see the prior page for visitor, distribution, and attendance estimates.

WEBINAR SERIES

\$1,500 | ONE PER WEBINAR

The NAEPC Robert G. Alexander Webinar Series provides leaders in the estate planning community with accessible, high quality supplemental education.

BENEFITS

- Logo / link in all email announcements for webinar chosen
- Logo on one social post announcing event for webinar chosen - **NEW**
- Verbal appreciation from moderator at beginning and end of webinar chosen
- Up to two minutes to introduce your firm or play a video about the firm at the beginning of the webinar chosen
- Provide NAEPC with a one-page flyer about the firm for posting in the webinar chat window - **NEW**
- Logo / link on post-event email from NAEPC staff to registered participants - **NEW**

THE FINE PRINT

- Programs typically take place on the second Wednesday of each month at 3:00 pm ET
- Sponsorship does not confer the right to provide or designate a speaker, other than the person offering the firm's introduction
- NAEPC reserves the right to change the sponsor's month of support to another month if a conflict exists between the sponsoring firm and presenter

Find the most current schedule at
naepc.org/events/webinar

	Distribution	Average Registration	Day-of Attendance
Webinar Series	13,500	525 per event	65%



COUNCIL ACTIVITIES

\$1,500 | SIX AVAILABLE

An estate planning council is a local membership organization made up of multi-disciplinary professionals who collaborate to advance the profession and client service. As an NAEPC member council, the organization benefits from educational programming support, leadership development, national conferences and events, and the ability to promote and support the Accredited Estate Planner® (AEP®) designation within its community.

This **NEW SPONSORSHIP** provides affordable visibility among the leaders and staff members of affiliated councils while helping NAEPC deliver the unsurpassed resources and education referenced so prominently within its mission.

BENEFITS

SHARED AMONG ALL SPONSORS

- Limited to six sponsors
- Logo / link in all Regional Leadership Conference marketing emails and logo on all social posts
- Logo / link in all Council Leader Education Series marketing emails and logo on related social posts
- Logo on post-event recording, posted to NAEPC website
- Logo recognition and onsite signage at three Regional Leadership Conferences during 2026 and verbal acknowledgment as event sponsor
- Provide one item for distribution at each of three Regional Leadership Conferences



	Distribution	Average Registration	Day-of Attendance
Council Leader Education Series	2,000 leaders & staff	45	60%
Regional Leadership Conference	2,000 leaders & staff	40-50 per event	95%

NAEPC 2026 COMMITMENT FORM

Step #1, Participation

Check Your Level of Support:

Patron	Estate Planners Forum Sponsor	Estate Planners Forum Exhibit	Estate Planners Forum Support	Webinar Series	Council Activities
\$15,000	\$3,000 / \$5,000	\$1,250 / \$2,250	\$500 / \$800	\$1,500	\$1,500
	May / October / Both Events	May / October / Both Events	May / October / Both Events	preferred month	

Step #2, Details and Contacts

HOW SHOULD YOUR COMPANY NAME APPEAR IN OUR MATERIALS? _____

WEBSITE ADDRESS _____

**Please be exact and make sure text is legible. This information, including the website address you provide, will be used within program materials / as the link (for benefits related to website placement).*

What is your firm's primary discipline or specialty? Check all that apply.

Accounting Appraisal Banking/Trust Financial Planning Insurance Legal Life Settlements Non-Profit Software Valuation

Other (please describe) _____

Contacts & Other Important Details

Primary Contact's Name _____

Primary Contact's Telephone _____ Primary Contact's Email _____

Address _____ City, State, Zip Code _____

Primary Contact's Signature _____

**By signing above, I/we agree that we will comply with all rules and regulations contained within the prospectus, including the mail list policy. NAEPC cannot accept or execute changes to the rules and regulations, addendums to the rules and regulations, or additional agreements related to participation.*

Additional / Marketing Contact

This person will be copied on all pre-conference details and communication, including the logistics kit that provides pre-event details. If none, leave blank.)

Marketing Contact's Name _____

Marketing Contact's Telephone _____ Marketing Contact's Email _____

Address _____ City, State, Zip Code _____

Step #3, Payment ➔ **⚠ PLEASE DO NOT EMAIL THIS FORM WITH CREDIT CARD INFORMATION**

✓ FULL PAYMENT REQUIRED WITH COMMITMENT

✓ RETAIN THIS FORM AS YOUR RECEIPT

____ I have used the secure credit card submission form found at www.naepc.org/products/product/7 (payments are not automatically processed) - **PREFERRED**

____ Please use my credit card (If your firm requires an onboarding process to initiate payment, email instructions to conference@naepc.org.)

Credit Card Number _____ Exp. Date _____

Amount \$ _____ Name as it appears on card _____

Zip Code Associated with Credit Card's Billing Address _____ Signature _____

____ Enclosed is our check, made payable to "NAEPC" (mail to the address below)

ACH payments may also be accepted. Please email conference@naepc.org for details.

Direct inquiries to sponsorship@naepc.org

2001 Crocker Rd., Ste. 510 | Westlake, OH 44145 | 866-226-2224



RULES & REGULATIONS

Commitment, Payment & Cancellation • Full payment is required with the commitment form and is non-refundable. NAEPC has the right to refuse participation to any person or firm that, in its sole discretion, does not support the mission of the association or the educational and other purposes of the Estate Planners Forum.

Act of God • In the case of cancellation of the conference or other association due to Acts of God, war, threats or acts of terrorism, governmental authority, fire, strike, labor disputes, frustration of purpose, commercial impracticability, or any other cause beyond the control of the NAEPC, this agreement shall terminate, and NAEPC shall not be responsible for any damages or expenses incurred in connection therewith.

Addendums • NAEPC cannot accept or execute changes to the rules and regulations, addendums to the rules and regulations, or additional agreements related to participation.

Assignment of Exhibit Space • Assignment of space is determined by the NAEPC in its sole discretion.

Insurance & Liability • Sponsor/exhibitor/supporter assumes entire responsibility and hereby agrees to protect, indemnify, defend, and save the NAEPC and its employees, independent contractors, and board of directors harmless against all claims, losses and damages to persons or property, governmental charges or fines and attorney's fees arising out of or caused by sponsor's transportation, installation, removal, maintenance, occupancy, display or use of exhibits, or of the exhibition premises or a part thereof, or for the conduct of or harm caused to attendees at any special supplemental event hosted by the sponsor/exhibitor/supporter, excluding any such liability caused by the sole negligence of NAEPC and its employees, contractors, and board of directors.

Logos and Publicity • NAEPC will use the logo(s), firm name, design(s), trademarks, etc. provided by sponsor/exhibitor/supporter for the sole purpose of fulfilling benefits associated with the chosen level of support or opportunity and may do so without obtaining prior consent. NAEPC, National Association of Estate Planners & Councils, and the Estate Planners Forum logos may not be used by sponsor/exhibitor/supporter for any purpose. The sponsoring or exhibiting company may reference their attendance at the "Estate Planners Forum", however.

Mail List Policy and Usage • Based on the chosen level of support or opportunity, sponsors/exhibitors/supporters may receive one pre-conference and/or one post-conference mailing list of contact details for the specific use of promoting their attendance. This list will include name, designations/discipline, firm name, postal mailing address, and email address to the extent that they were provided by the attendee, for those who have not opted out of receiving sponsor/exhibitor/supporter messages.

The pre-conference list will be emailed to the primary and marketing contact four weeks prior to the program, and the post-conference list will be sent no later than two weeks after the conclusion of the program. By completing the commitment form and accepting delivery of these lists, a sponsoring/exhibiting/supporting company agrees to the terms outlined within this section.

- User may use attendee contact information for an approved use only ONCE each time an attendee list is distributed. The pre-conference list may only be used pre-conference and the post-conference list must be used within thirty (30) days of the date on which it was sent by NAEPC.
- Gathering phone numbers is prohibited, as is telephoning those who appear within.
- All email messages must contain a mechanism by which the recipient can opt-out.

RULES & REGULATIONS, CONTINUED

Mail List Policy and Usage, Continued •

- NAEPC, National Association of Estate Planners & Councils, and the Estate Planners Forum logos may not be used on any material created by user. The sponsoring/exhibiting/supporting company may reference their attendance at the “Estate Planners Forum”.
- An approved use includes a postal mailing **or** an email message, but not both.
- User may not copy, replace, or duplicate the information contained within, any portion thereof, or extract or retain any information there from. User may not at any time permit any attendee names and addresses to pass into the hands of any other person, association, organization, or company.
- User will hold the provider harmless against any damages or claim of damage, costs and reasonable attorney fees, arising out of any actual or alleged impropriety or illegality of mailed matter or infringement of trademark, trade name, or copyright belonging to others.
- User agrees to forward within ten (10) days following receipt, any letters or documents (or copies thereof) of complaints received from attendees or a report of verbal complaints by attendees regarding the user's mailing, the matter transmitted therein, or the offered product or service.
- The user is solely responsible for determining that the information provided is sufficiently accurate for the user's purposes.

Any prohibited or unauthorized use of the mailing list by a sponsoring/exhibiting/supporting company or failure to report attendee complaints constitutes a material breach of the agreement and may exclude company from participation in future NAEPC events and/or cancellation of sponsorship / exhibition space / support without refund. Direct all questions related to this policy to conference@naepc.org or 866-226-2224.

Staffing and Behavior of Representatives • All representatives must be registered with NAEPC. In the event an attendee is not registered and attends any portion of the event, NAEPC may invoice the firm for the appropriate registration fee, and such invoice must be paid within 14 days of receipt.

All firm representatives must adhere to the NAEPC Event Conduct Statement: naepc.org/content/conduct. In addition, any representative or firm displaying inappropriate or aggressive behavior and/or sales tactics, including, but not limited to, touching participants and/or their apparatus without their express permission, will be asked to leave immediately and may result in the removal of an exhibit or cancellation of a sponsorship / exhibition space / support with no refund of fees, including, but not limited to the sponsor fee, attendee fee, transportation and lodging costs, meals, shipping costs, etc.

Enforceability • If any portion(s) of this document is (are) determined to be invalid or unenforceable, the remaining portion(s) shall nevertheless remain valid and enforceable.





CONTACT



866-226-2224



sponsorship@naepc.org



naepc.org
estateplannersforum.org



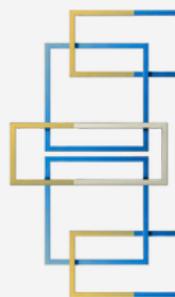
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NAEPC

**NATIONAL ASSOCIATION OF
ESTATE PLANNERS & COUNCILS**

COLLABORATE · EDUCATE · CULTIVATE



**ESTATE
PLANNERS
FORUM**

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COLLABORATIVE CONFERENCE