

SPONSORSHIP PROSPECTUS

Estate and Trust Planning Conference 2027

Reach the advisors who shape California's wealth planning.

July 15–16, 2027

Westdrift Manhattan Beach · Manhattan Beach, California

Sponsorship deadline: **April 9, 2027**

Join us in Manhattan Beach

Taking place July 15–16, 2027, at the Westdrift Manhattan Beach, this event brings together the CPAs, attorneys and financial advisors who guide estate, trust and wealth planning for clients across California. As a sponsor, you get two days of face-to-face access to the professionals who influence high-net-worth client decisions — and the purchasing choices that go with them.

2 days

Of in-person access to attendees

Multi-discipline

CPAs, attorneys and financial advisors

High-net-worth

Advisors to California's wealthiest clients

Who you'll meet

This is a specialist room. Attendees are the CPAs, estate and trust attorneys, and financial advisors clients call before they make a major decision — and they are the ones who recommend the platforms, valuation services, trust companies, insurance products and software their clients and firms end up using. Few audiences carry this much influence per person.

Why sponsor this conference

- **Influence, not just volume.** Every attendee advises clients with real assets at stake, which makes each conversation worth more than a badge scan.
- **Three professions in one room.** CPAs, attorneys and financial advisors together — a referral network you can reach in a single event.
- **Face time, not just a logo.** Silver level and above includes an exhibit booth and time with attendees at meals, breaks and receptions.
- **The only audience like it.** CalCPA is the largest state CPA society in the United States and the most direct path to California's CPA community.
- **A stage if you want one.** Platinum includes a speaking opportunity, and a limited Session Sponsor add-on puts your content in front of the room for a full CPE session.

Deadline: Sponsorship commitments are due **April 9, 2027**. Levels and add-ons are limited and sell on a first-come basis.

Sponsorship levels

Four levels, each building on the last. Compare what's included and pick the level of presence you want in the room.

	Bronze	Silver	Gold	Platinum
Sponsor fees	\$2,750	\$5,500	\$10,000	\$20,000
Complimentary registration(s) including booth staff	1	2	4	6
Logo on event page and in email promotions	✓	✓	✓	✓
Verbal acknowledgment during event	"All sponsors"	"All sponsors"	"All sponsors"	By company name
Ad in conference eBook	Half-page ad	Half-page ad	Full-page ad	Full-page ad
Ad in the transition slides that play during breaks	Shared slide	Shared slide	Full slide	Full slide
Opportunity to enjoy meals, breaks and receptions with attendees	—	✓	✓	✓
Exhibit booth (6-foot table)	—	✓	✓	✓
Attendee event registration list (pre and post event)	—	—	✓	✓
60 sec video to play during breaks	—	—	—	✓
Speaking opportunity*	—	—	—	✓

*Moderator, panelist, break, or session speaker depending on opportunity and availability.

Choosing a level

- **Bronze — \$2,750.** One registration, brand presence at the event and in promotions, plus ad placement in the eBook and break slides.
- **Silver — \$5,500.** Adds a 6-foot exhibit booth, a second registration, and time with attendees at meals, breaks and receptions.
- **Gold — \$10,000.** Adds the pre- and post-event attendee registration list, a full-page eBook ad, a full break slide, and four registrations.
- **Platinum — \$20,000.** Top-tier presence: acknowledgment by company name, a 60-second video during breaks, a speaking opportunity, and six registrations.

Sponsor add-on package

Own a moment of the event. This add-on is available to Bronze sponsorships or higher, and quantity is strictly limited.

Package	Investment	Available	What's included
Session Sponsor	\$4,000	1 available	50-minute CPE session (content must be preapproved for CPE). Recognition on promotional materials.

Only one available. The Session Sponsor package is the single highest-visibility position at this conference — a full CPE session in front of the entire room. It goes to the first sponsor who claims it.

Reserve your sponsorship

Tell us the level you want and we'll hold it. Commitments are due **April 9, 2027**, and the limited add-on goes to the first sponsor who claims it.

advertising@calcpa.org

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