



SOUTHERN CALIFORNIA COUNCIL of
Charitable Gift Planners

ANNUAL SPONSORSHIP PROSPECTUS 2024-2025

ABOUT SoCalCGP

The Southern California Council of Charitable Gift Planners (SoCalCGP) is proud to celebrate 44 years of empowering nonprofits through education, networking, and mentoring, enhancing planned giving programs for organizations at all levels.

Our strength comes from members who work directly with thousands of donors and clients, helping them achieve their philanthropic dreams. With over 200 professionals who are members—including planned giving and major gifts officer, attorneys, CPAs, and wealth managers—and a growing network of about 4,000 engaged in our educational programs, SoCalCGP fosters a dynamic community across Southern California, including San Diego, the Inland Empire, Orange County, Los Angeles County, and Santa Barbara and Ventura Counties.

This important work is made possible by the generous support of our Annual Sponsors. Your sponsorship directly enhances our educational offerings, broadens access, and creates new opportunities for connection between attendees and partnering organizations. **We invite you to join us as an Annual Sponsor for the 2024-2025 year, supporting our programming and activities.**

As a recognized Annual Sponsor, you'll have the opportunity to showcase your expertise, connect with peers, and meet local industry leaders through our flagship events, including the introductory planned giving seminars PG101 and PG201, peer-to-peer roundtables, general membership meetings, regional mixers, and the renowned Western Regional Planned Giving Conference.



Heidi Simpson-Sandoval
Communications & Development
Doheny Eye Institute
SoCalCGP Sponsorship Chair



William LaBore
Planned Giving Officer
Loma Linda University Health
SoCalCGP Sponsorship Co-Chair

SoCalCGP thanks all the Partners who supported us in 2023/2024!

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About SoCalCGP Annual Sponsorships

We value our sponsors and are committed to building meaningful partnerships. We've expanded our event programming, digital content, and recognition levels to highlight your services within our professional community.

With a broader reach across Southern California—from San Diego to Santa Barbara—your sponsorship offers even greater impact and value. We look forward to celebrating your partnership **throughout the year**.

2024-2025 Annual Sponsorship Levels

Diamond Sponsor	\$10,000
Platinum Sponsor	\$7,500
Gold Sponsor	\$5,000
Silver Sponsor	\$3,500
Bronze Sponsor	\$2,000

Become a SoCalCGP Annual Sponsor today!

You can register:

-  Online at socialcgp.org/sponsor-socialcgp
-  By email to events@socialcgp.org
-  By calling 949-715-5400
-  Mailing us at: SoCalCGP, P.O. Box 10, Manhattan Beach, CA 90267

If you need an invoice, let us know at events@socialcgp.org and we'll email one to you!

JOIN US! BECOME AN ANNUAL SPONSOR TODAY BY CONTACTING THE SoCalCGP OFFICE:

SoCalCGP · P.O. Box 10 · Manhattan Beach, CA 90267

Phone: 949-715-5400 · Email: events@socialcgp.org · Online: socialcgp.org/sponsor-socialcgp



SoCalCGP WESTERN REGIONAL PLANNED GIVING CONFERENCE

CHARTING THE COURSE

COSTA MESA, CA • MAY 21-23, 2025

Get Ready for WRPGC 2024-2025: The Premier Gathering for Gift Planning & Nonprofit Leaders!

For over 30 years, the Western Regional Planned Giving Conference (WRPGC) has cemented its reputation as one of the most dynamic and impactful educational experiences for gift planners and allied professionals alike. Last year, WRPGC 2024 delivered cutting-edge charitable planning strategies, breakthrough leadership insights, and innovative approaches to building more inclusive organizations – and it was an absolute smash hit. But 2025 promises to be even more extraordinary, and we need *your* energy, ideas, and passion to make it happen!

Mark your calendars for the **34th Annual WRPGC, happening May 21-23, 2025, at the Westin South Coast Plaza, Costa Mesa.** As one of the largest regional planned giving events in the country, this conference draws hundreds of top nonprofit and allied professionals from across Southern California and the Western United States. It's a rare and unbeatable opportunity to network, share ideas, and connect with key decision-makers who are shaping the future of philanthropy.

Our Annual Sponsorships are designed to bring sponsors and attendees together like never before. By partnering with us, you'll not only get to showcase your expertise and connect with the right people but also take the stage alongside some of the brightest minds in the field. Our model ensures sponsors can build meaningful connections that last beyond the conference.

Explore the sponsor benefits table and discover how the SoCalCGP Annual Sponsorship will help you engage and inspire attendees throughout WRPGC and beyond.

Join us for WRPGC 2025 – where the future of gift planning takes shape, and your impact begins.



Kimberly Jetton
President and Founder
Pleides Nonprofit Advisors, LLC
WRPGC Chair



Danese Bardot, JD, CFRE
Senior Director of Development, Planned Giving
Cal State University
WRPGC Co-Chair

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ANNUAL SPONSORSHIP BENEFITS

Submit the Annual Sponsorship Payment form
Online at socalcgp.org/sponsor-socalcgp

ANNUAL SPONSORSHIP LEVEL				
Diamond Sponsor	Platinum Sponsor	Gold Sponsor	Silver Sponsor	Bronze Sponsor
\$10,000	\$7,500	\$5,000	\$3,500	\$2,000
1 Available	Multiple Available	Multiple Available	Multiple Available	Multiple Available

BENEFITS					
Western Regional Planned Giving Conference					
Listed as presenting sponsor in association with SoCalCGP	✓				
Sponsor and introduce the Keynote Speaker	✓				
Sponsor and introduce one Breakout Session and Speaker	✓	✓	✓	✓	
Exhibit table	✓	✓	✓	✓	✓
Complimentary registration(s)	4	3	3	2	1
Signage at one Networking Opportunity: Primer Session, Welcome Reception (incl. Opening Remarks), Breakfasts, Breaks, Cocktail Reception, and additional conference activities. First come, first served.	✓	✓	✓		
Potential speaking opportunity	✓	✓	✓	✓	
Complete attendee list	✓	✓	✓	✓	
General Membership Meetings					
Opportunity to introduce General Meeting speaker(s) – held four times a year in January, March, September, and November	✓	✓	✓		
Complimentary General Meeting registration(s)	4	3	3	2	1
Opportunity to sponsor and introduce speaker(s) at PG101 or PG201	✓	✓			
Complimentary webinar registration(s)	✓	✓	✓	✓	✓
Membership					
Discount on regular membership for individuals in your organization	50%	50%	50%	50%	N/A
Complete membership contact list	✓				
Name Recognition and Visibility					
Recognition by sponsorship level on SoCalCGP website during entire fiscal year, and in all WRPGC communications and mobile app	✓	✓	✓	✓	✓
Visibility of company name, logo, website, and summary on digital platforms (LinkedIn, Instagram, SoCalCGP website, WRPGC website and mobile app, plus, quarterly e-newsletter)	✓	✓	✓	✓	✓
Sponsor highlight on SoCalCGP LinkedIn	✓	✓	✓	✓	✓
Opportunity to provide pre-approved educational article for one issue of monthly e-newsletter (sent to entire SoCalCGP list, posted on LinkedIn and website)	✓	✓	✓	✓	✓



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Online at
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Mailing this form:
SoCalCGP, P.O. Box 10
Manhattan Beach, CA 90267

If you need an invoice, let us know at events@socalcgp.org and we'll email one to you!

Sponsorship Pledge Form

Company: _____

Company Contact/Title: _____

Address: _____

City/State/Zip: _____

Phone: _____

Email: _____

Annual Sponsorship Opportunities: Please check all that apply and calculate your total.

	Diamond Sponsor	\$10,000	
	Platinum Sponsor	\$7,500	
	Gold Sponsor	\$5,000	
	Silver Sponsor	\$3,500	
	Bronze Sponsor	\$2,000	
		TOTAL	\$

Payment:

Complete form online at socalcgp.org/sponsor-socalcgp

Please make check payable to SoCalCGP and mail to: SoCalCGP, P.O. Box 10, Manhattan Beach, CA 90267
SoCalCGP accepts credit cards. Please complete the information below if paying with credit card.

I am using a: Mastercard Visa American Express

Card Number _____ Exp. Date _____ Sec. Code _____

Name on Card _____

Signature _____ Date _____

SoCalCGP is open to determining a payment schedule that works for you. If you'd like create a pledge, please contact SoCalCGP Office at events@socalcgp.org or call 949-715-5400.