



# SPONSORSHIP PROSPECTUS

## 2025-2026

### About SoCalCGP

The Southern California Council of Charitable Gift Planners (SoCalCGP) proudly celebrates 45 years of advancing philanthropy by empowering both nonprofit and allied professionals who guide donors and clients in their charitable giving. Through education, networking, and mentoring, we serve a dynamic community of charitable gift planners, attorneys, financial advisors, trust officers, and others who are committed to strengthening charitable giving. The result is deeper impact, more meaningful donor relationships, and a stronger return on investment for all involved.

With more than 200 members—including planned giving officers, major gift professionals, attorneys, CPAs, and wealth advisors—and a broader network of over 4,000 individuals engaged in our educational programs, SoCalCGP fosters a vibrant community across Southern California. Our reach spans San Diego, the Inland Empire, Orange County, Los Angeles County, and Santa Barbara and Ventura Counties.

This meaningful work is made possible through the generosity of our Annual Sponsors.

Your sponsorship directly supports our high-quality educational offerings, expands access to professional development, and builds valuable connections among attendees and sponsoring organizations. As a valued Annual Sponsor, you'll have the opportunity to showcase your expertise, build brand visibility, and engage with nonprofit and allied professionals through a variety of signature events—including our Planned Giving 101 and 201 seminars, topical webinars, monthly programs, and the premier Western Regional Planned Giving Conference in May.

**We invite you to partner with us as a 2025–2026 Annual Sponsor and help shape the future of charitable gift planning across our region.**



**William LaBore**  
Director of Planned Giving  
Loma Linda University Health  
*SoCalCGP Sponsorship Chair*



**Heidi Simpson-Sandoval**  
Planned Giving, Development & Communications  
Doheny Eye Institute  
*SoCalCGP Sponsorship Co-Chair*

# SoCalCGP thanks all the Partners who supported us in 2024/2025!

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## 2025-2026 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:**

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[events@socalcgp.org](mailto:events@socalcgp.org)



**BY MAIL TO:**

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

*If you need an invoice, let us know at [events@socalcgp.org](mailto:events@socalcgp.org) and we'll email one to you!*

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

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*Images are attendees, speakers, and sponsors of the 2025 Western Regional Planned Giving Conference.*

## Get Ready for WRPGC 2025-2026: The Premier Gathering for Gift Planning & Nonprofit Leaders!

Mark your calendars for **May 20–22, 2026**, as we celebrate the **35th Annual Western Regional Planned Giving Conference**.

Our 2026 theme, *Beyond Momentum: Innovation, Legacy, and Impact*, reflects the bold ideas, lasting relationships, and shared expertise that define this conference. Each year, we bring together leaders in philanthropy, law, and finance—gift planners, trust and estate attorneys, wealth managers, nonprofit professionals, advisors, and others—who work alongside individuals and families to shape impactful legacies.

Annual sponsorship supports SoCalCGP's programs throughout the entire fiscal year, and the conference is where your visibility takes center stage. Sponsors receive prominent recognition, a vendor table, and valuable opportunities to connect directly with a highly engaged audience of trusted advisors, charitable gift planners, and other decision-makers. We also invite sponsors to submit conference presentation proposals to share their expertise with attendees. Annual sponsorship supports SoCalCGP's programs throughout the entire fiscal year, and the conference is where your visibility takes center stage. Sponsors receive prominent recognition, a vendor table, and valuable opportunities to connect directly with a highly engaged audience of trusted advisors, charitable gift planners, and other decision-makers. Sponsors are also invited to submit presentation proposals for consideration. (Please note that conference sessions will be selected based on several factors, including alignment with SoCalCGP values, proposal quality, relevance, and overall program balance.)

**By supporting SoCalCGP, you are helping to strengthen the charitable gift planning community and investing in the future of philanthropy across Southern California and beyond.**



**Danese Bardot, JD, CFRE, IPA**  
Senior Director of Development,  
Planned Giving, CSU Los Angeles  
*Conference Chair*



**Cris Lutz, CSPG, CAP®, IPA**  
Assistant Vice President of Gift Planning,  
The Huntington  
*Conference Co-Chair & Immediate Past President*

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# ANNUAL SPONSORSHIP BENEFITS

Submit the Annual Sponsorship Payment form  
Online at [socalcgp.org/sponsor-socalcgp](https://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 Opening Keynote   | ✓ |   |   |   |   |
| Introduce one breakout session speaker  | ✓ | ✓ | ✓ | ✓ |   |
| Exhibit table   | ✓ | ✓ | ✓ | ✓ | ✓ |
| Complimentary registration(s) – a \$595-\$695 value per person!   | 4 | 3 | 3 | 2 | 1 |
| Sponsor recognition at one of the following: Planned Giving Primer or Advanced Case Study, Welcome Reception, Breakfast, Break, Networking Reception. First come, first served. | ✓ | ✓ | ✓ |   |   |
| Potential speaking opportunity  | ✓ | ✓ | ✓ | ✓ | ✓ |
| Complete attendee list  | ✓ | ✓ | ✓ | ✓ | ✓ |

### Educational Sessions

|   |   |   |   |   |   |
|---|---|---|---|---|---|
| Opportunity to introduce speaker(s)                   | ✓ | ✓ | ✓ |   |   |
| Complimentary registration(s)                         | 4 | 3 | 3 | 2 | 1 |
| Opportunity to 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 all conference communication and mobile conference app        | ✓ | ✓ | ✓ | ✓ | ✓ |
| Additional visibility on social media channels (LinkedIn, Instagram) and in quarterly e-newsletter   | ✓ | ✓ | ✓ | ✓ | ✓ |
| Opportunity to provide pre-approved educational article for one issue of e-newsletter (sent to entire SoCalCGP list, posted on social media and website) | ✓ | ✓ | ✓ | ✓ | ✓ |





# SOUTHERN CALIFORNIA COUNCIL of Charitable Gift Planners

## Annual Sponsorship 2025-2026

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*If you need an invoice, let us know at [events@socalcgp.org](mailto: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      |           |
|  |                  | <b>TOTAL</b> | <b>\$</b> |

### Payment:

**Complete form online at [socalcgp.org/sponsor-socalcgp](http://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](mailto:events@socalcgp.org) or call 949-715-5400.