



SOUTHERN CALIFORNIA COUNCIL of Charitable Gift Planners

SPONSORSHIP PROSPECTUS 2026-2027

Become a SoCalCGP 2026–2027 Sponsor

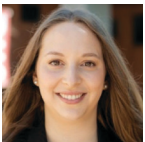
For 46 years, the Southern California Council of Charitable Gift Planners (SoCalCGP) has brought together the professionals who help donors create lasting charitable impact. As a 2026–2027 Sponsor, you will support year-round education, strengthen one of the nation's most respected charitable gift planning communities, and build meaningful visibility with the professionals shaping philanthropy across Southern California and beyond.

SoCalCGP at a Glance

- Recognized 501(c)(3) tax-exempt nonprofit
- 46 years advancing philanthropy
- 200+ members
- 4,000+ professionals in our broader network
- Serving Southern California, including San Diego, the Inland Empire, Orange County, Los Angeles County, Santa Barbara, and Ventura Counties
- Year-round education, networking, mentorship, and leadership development
- Home of the Western Regional Planned Giving Conference, one of the oldest conferences on Planned Giving!

Your sponsorship connects your organization with a highly engaged audience of charitable gift planners, attorneys, financial advisors, trust officers, CPAs, wealth advisors, nonprofit leaders, community foundations, and other trusted advisors, all while advancing education and collaboration across the profession.

Save the Date – On May 26–28, 2027, SoCalCGP will host the 36th Annual Western Regional Planned Giving Conference, our flagship event, and the premier annual gathering for the charitable gift planning community.

**Emma Welch, JD, CSPG**

(she/her/hers)
Advisor Relations & Gift Planning Officer
California Community Foundation
Sponsorship Chair

**Rudy Flesher CAP®, CEPA®**

(he/him/his)
Regional Director, West
National Philanthropic Trust
Sponsorship and Conference Co-Chair

**Cris Lutz, CSPG, CAP®, IPA**

(she/her/hers)
Assistant Vice President of Gift Planning,
The Huntington
Conference Chair

**Heidi Simpson-Sandoval**

(she/her/hers)
Associate Director, Planned Giving, Development
& Communications, Doheny Eye Institute
President

Our theme, **Illuminating Impact: Guiding Generosity in Times of Change**, reflects the clarity, purpose, and resilience that define this community. In a philanthropic and economic landscape that continues to shift, thoughtful and creative leadership has never been more important.

The conference brings together gift planners, trust and estate attorneys, wealth managers, and nonprofit professionals – a community united by a shared commitment to helping donors shape impactful, enduring legacies.

Visibility Takes Center Stage

At the Western Regional Planned Giving Conference, sponsors receive prominent recognition, a vendor table, and direct opportunities to connect with trusted advisors, charitable gift planners, nonprofit leaders, and other decision-makers.

Share Your Expertise

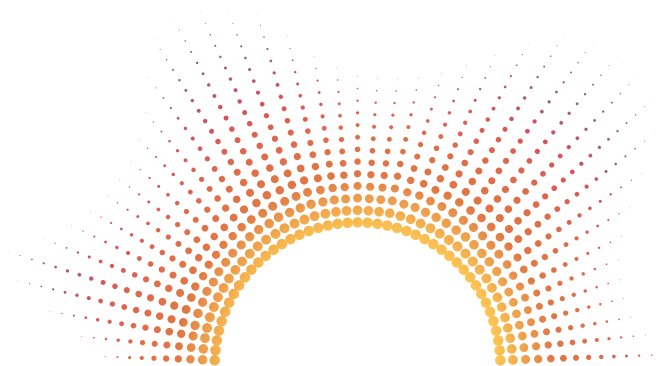
Sponsors are invited to submit conference presentation proposals for consideration, offering an opportunity to contribute insights on the issues, trends, and opportunities shaping charitable gift planning. Conference sessions are selected based on alignment with SoCalCGP values, proposal quality, relevance, and overall program balance.

Beyond professional expertise, what makes SoCalCGP special is the people. This is a warm, collaborative community of thought leaders who support one another as we navigate complexity, serve donors and clients, and strengthen philanthropy together.

Invest in the Future of Philanthropy

Your sponsorship helps strengthen the charitable gift planning community, expand access to professional development, and support the donors, advisors, and organizations shaping meaningful legacies.

By sponsoring SoCalCGP, you are investing in more than visibility. You are helping light the way forward for donors, advisors, and the organizations they champion. Join us.



Illuminating Impact:

Guiding Generosity in Times of Change

SoCalCGP Western Regional Planned Giving Conference

Costa Mesa, California • May 26-28, 2027

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@socalcgp.org • Online: socalcgp.org/sponsor-socalcgp

Thank you to our 2025/2026 Sponsors!

Diamond Level

The Stelter Company

Gold Level

Bank of America Private Bank

Capital Group

Crescendo

The Planned Giving Solutions
Group at PNC Institutional Asset
Management

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Rodriguez, Horii, Choi & Cafferata

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American Institute for
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California Community Foundation

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Mill Law Center

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State Street Investment Management

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The Charitable Services Group
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National Philanthropic Trust

Santa Barbara Foundation

TemoArjani LLP

The Music Center Foundation



COULD YOUR ORGANIZATION HOST ONE OF OUR EDUCATIONAL SESSIONS?

If you have hybrid event capabilities or an ideal venue setup, we'd love to collaborate!
Reach out to discuss hosting opportunities and help make our next educational program a success.

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
One (1) Available	Three (3) Available	Multiple Available	Multiple Available	Multiple Available

BENEFITS

Western Regional Planned Giving Conference

Listed as presenting sponsor in association with SoCalCGP	▲				
Introduce the Opening Keynote	▲				
Introduce one breakout session speaker	▲	▲	▲		
Sponsor recognition at one of the following: Welcome Reception, Breakfasts, Breaks, Lunch, Networking Reception. First come, first served. May be a shared sponsorship.	▲	▲	▲		
Exhibit table	▲	▲	▲	▲	▲
Attendee list	▲	▲	▲	▲	▲
Complimentary registration(s) – a \$595-\$695 value per person!	4	3	3	2	1

Educational Sessions

Opportunity to introduce speaker(s)	▲	▲	▲		
Complimentary registration(s) (in-person and virtual events)	4	3	3	2	1

Membership

Membership list	▲	▲			
50% discount on regular membership for individuals in your organization	▲	▲	▲	▲	

Name Recognition and Visibility

Recognition on SoCalCGP website, communications, the conference app, social media and in quarterly e-newsletter	▲	▲	▲	▲	▲
Opportunity to provide pre-approved educational article for one issue of e-newsletter (sent to SoCalCGP list, posted on social media and website)	▲	▲	▲	▲	▲



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Annual Sponsorship 2026-2027

Become a SoCalCGP Annual Sponsor today! You can register:



ONLINE AT:

www.socalcgp.org/sponsor-socalcgp



BY EMAIL TO:

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

Sponsorship Pledge and Check Payment Form

Company: _____

Company Contact/Title: _____

Address: _____

City/State/Zip: _____

Phone: _____

Email: _____

Annual Sponsorship Opportunities:

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

Payment:

Please make check payable to SoCalCGP and mail to: SoCalCGP, P.O. Box 10, Manhattan Beach, CA 90267

SoCalCGP accepts credit cards. Please visit www.socalcgp.org/sponsor-socalcgp to securely pay online or contact us at events@socalcgp.org for a payment link.

Recognized 501(c)(3) tax-exempt nonprofit. A portion of your payment may not be tax deductible. Please consult your tax adviser regarding the deductibility of this contribution.

Questions? Contact us at events@socalcgp.org or 949-715-5400.