



Archdiocese of Miami Development Corporation
Planned Giving Advisory Council

2019 LEGACY PLANNING SUMMIT: STRATEGIES FOR PROFESSIONALS



The New Challenges and Opportunities Facing Advisors Today

Patricia M. Annino, Esq.
Rimon, P.C.

Tuesday, May 14, 2019
8:30 AM - Networking Breakfast
09:30 AM - 11:30 AM Program

St. Thomas University
Miami Gardens, Florida



Attorneys | Certified Public Accountants | Investment Consultants
Financial Advisors | Wealth Managers | Insurance Agents
Certified Financial Planner Professionals | Certified Fundraising Executives

*CLE, CFP®, CPA/CPE, CTFA, CIMA, CFRE, Insurance Continuing Education Credits pending approval

www.adomdevelopment.org/seminar



About the 2019 Legacy Planning Summit: Strategies for Professionals

The 2019 Legacy Planning Summit: Strategies for Professionals is a unique opportunity for your organization to connect with tax and estate planning professionals in South Florida.

The Archdiocese of Miami Planned Giving Advisory Council (PGAC) is made up of volunteers who are professionals in the planned giving and estate and financial planning disciplines. Participants will include Attorneys, Certified Public Accountants, Investment Consultants, Financial Advisors/Wealth Managers, Insurance Agents, Certified Financial Planner Professionals and Certified Fundraising Executives.

Sponsors will receive acknowledgment prior to, during and after the Summit through Summit materials and the website, and enjoy significant contact with other professionals.

Planned Giving Advisory Council

Carlos F. Arazoza, J.D., CPA

Daniel J. Biggs, III, FICF, LUTCF

Katie Blanco Bourdeau, J.D., CFRE

Deacon John T. Ermer, Sr.

Salvador Ferradas, CFP®, CPWA®

Adam Scott Goldberg, J.D., LL.M.

Ghislain Gouraige, Jr., CEPA®

Reverend Michael J. Grady

Kristina Hernandez-Tilson, Esq.

Kim Krause, CFA

Alejandro S. Masferrer

Carmen Santamaria, Esq.

Reverend David Zirilli

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Sponsorship Opportunities

PRESENTING SPONSOR (Limit One): \$5,000

- 2 Full Page Ads
- 20 tickets to Seminar
- 10 tickets to invitation-only Sponsor Luncheon
- Reserved, premium seating at Seminar and Sponsor Luncheon
- Logo/name recognition on all materials
- Name recognition on all print and promotional materials as Presenting Sponsor
- Company logo on the website
- Onstage recognition as Presenting Sponsor
- Recognition at Sponsor Luncheon
- Introduction and remarks at Seminar breakfast

PLATINUM SPONSOR: \$2,500

- 1 Page Full Ad
- 10 tickets to Seminar
- 6 tickets to invitation-only Sponsor Luncheon
- Reserved, premium seating at Seminar and Sponsor Luncheon
- Logo/name recognition on all materials
- Company logo on the website
- Onstage recognition as Platinum Sponsor
- Recognition at Sponsor Luncheon

GOLD SPONSOR: \$1,000

- ½ Page Ad
- 6 tickets to Seminar
- 4 tickets to invitation-only Sponsor Luncheon
- Reserved, premium seating at Seminar and Sponsor Luncheon
- Company logo on the website

SILVER SPONSOR: \$500

- ¼ Page Ad
- 2 tickets to Seminar
- 2 tickets to invitation-only Sponsor Luncheon
- Company logo on the website

Commitment Form

Sponsorship Levels

- Presenting Sponsor - \$5,000.00
- Platinum Sponsor - \$2,500.00
- Gold Sponsor - \$1,000.00
- Silver Sponsor - \$500.00

Individual Ticket

- Individual Admission \$55/\$70 *Register by 4/5/2019 for discount*
Qty _____

Contact Information

Name/Company _____
as you would like to appear on printed materials

Contact Name _____

Address _____

City _____ State _____ Zip Code _____

Phone _____ Email _____

Method of Payment

Check - Please make check made payable to **Archdiocese of Miami**
Amount \$ _____ Check # _____

Credit Card: * Visa * Master Card * Amex

Amount \$ _____

Name as it appears on card: _____

Card Number _____ Exp date ____ / ____

Billing Address _____

City _____ State _____ Zip code _____

Signature _____

Send completed form and payment to:
Archdiocese of Miami Development Corporation
9401 Biscayne Blvd.
Miami Shores, FL 33138

Deadlines

Logo and/or Artwork - May 1, 2019



For additional information, please contact
(305) 762-1054 or events@theadom.org

www.adomdevelopment.org/seminar

Ad Requirements

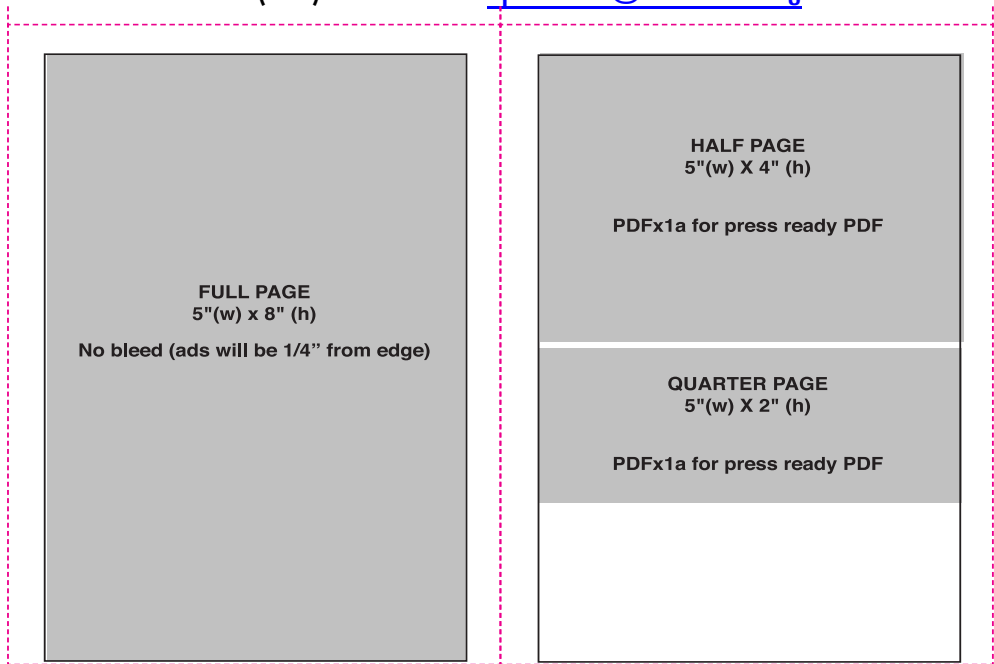
- FULL PAGE – 5" (w) x 8" (h)**
- HALF PAGE - 5" (w) X 4" (h)**
- QUARTER PAGE - 5" (w) X 2" (h)**

Each program book will be a black and white Ad Book. **Please submit Gray scale or Black and White only.** RGB files WILL be converted, but may lose quality. Please submit CMYK color only. RGB files WILL be converted, but may lose some color quality. Do not use registration "color" except for crop marks and info text. The Archdiocese of Miami Development Corporation Marketing Team and its agents cannot be responsible to match colors if converting inappropriate color formats within client-submitted ads.

Ad Requirements: 300 dpi high res jpeg or a high resolution PDF file. Please, NO Microsoft Word files or PDFs created from MS Word. If converting a PDF from InDesign or QuarkXPress, it should be a PDFx1a or press ready file. All ads are the exact size as stated - no bleeds. There will be a quarter inch of white space on each page.

Submission deadline: April 26, 2019

Address materials/questions to Sabrina Paul-Noel, MPA
(305) 762-1112 or spaulnoel@theadom.org



Dotted outline shows book page edge with quarter inch margins.
Ad size given here is live area and will not extend beyond these measurements (inside covers are full bleed).

The examples here are representational of ad proportions and not scaled at 100%.