2020 Legacy Planning Summit: Strategies for Professionals
“Evolving Trends and Changing Laws”
John J. Scroggin, J.D., LL.M. (Tax), AEP (Distinguished)

Wednesday, April 29, 2020
8:00 AM - Breakfast & Registration | 9:30 AM - Program

The Donna E. Shalala Student Center
University of Miami
1330 Miller Drive
Coral Gables, FL 33146
2020 Legacy Planning Summit

The 2020 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.
- Alejandro S. Masferrer
- Sabrina L. Paul-Noel, MPA
- Jose Felix Rivas
- Lourdes B. Rodriguez, MBA
- Carmen Santamaria, Esq.
- Reverend David Zirilli
Jeff has practiced as a tax, business and estate planning attorney in Atlanta for over 41 years. In 2017, Jeff was inducted into the NAEPC Estate Planning Hall of Fame as its 105th inductee. US News and World Report named him one of the 2018, 2019 and 2020 Best Lawyers in America and he has been named a Georgia SuperLawyer for each of the last eleven years. Jeff served as a member of the Board of Trustees of the University of Florida Levin College of Law from 2011 to 2018. Jeff was Founding Editor of the NAEPC Journal of Estate and Tax Planning from 2006-2010 and is the author of over 260 published articles on tax, business and estate planning.

Jeff has been quoted over 100 times in the national media, including 9 times in the Wall Street Journal, 3 times in the New York Times, 3 times in USA Today, and 5 times in Forbes Magazine.

Jeff practices out of an 1889 house in the heart of the historic district of Roswell, Georgia – one of the few areas around Atlanta that was not destroyed during the 1864 Battle for Atlanta. The house contains one of the largest collections of IRS and tax memorabilia in the US. The collection of over 100,000 items was featured in a front-page article in Wall Street Journal on April 15, 2015.
<table>
<thead>
<tr>
<th>Sponsorship Level</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Diamond Sponsor</td>
<td>$5,000</td>
</tr>
<tr>
<td>Platinum Sponsor</td>
<td>$3,500</td>
</tr>
<tr>
<td>Gold Sponsor</td>
<td>$2,000</td>
</tr>
<tr>
<td>Silver Sponsor</td>
<td>$1,000</td>
</tr>
<tr>
<td>Bronze Sponsor</td>
<td>$500</td>
</tr>
</tbody>
</table>

**PROMO**

$75 Individual Ticket

$50 Early Bird Special
Expires 02/21/2020

**PURCHASE NOW!**
Sponsorship Levels

**Diamond Sponsor**
- 2 Full Page Ads
- 10 tickets to Seminar
- 10 tickets to Luncheon
- Premium seating at Seminar
- Premium seating at Sponsor Luncheon
- Logo/name recognition on all materials
- Recognition on all materials
- Onstage recognition

**Platinum Sponsor**
- 1 Full Page Ad
- 6 tickets to Seminar
- 6 tickets to Luncheon
- Premium seating at Seminar
- Premium seating at Sponsor Luncheon
- Logo/name recognition on all materials
- Recognition on all materials
- Onstage recognition

**Gold Sponsor**
- 1 Half Page Ad
- 4 tickets to Seminar
- 4 tickets to Luncheon
- Preferred seating at Seminar
- Preferred seating at Sponsor Luncheon
- Logo/name recognition on all materials
- Recognition on all materials

**Silver Sponsor**
- 1 Half Page Ad
- 3 tickets to Seminar
- 3 tickets to Luncheon
- Preferred seating at Seminar
- Logo/name recognition on all materials
- Recognition on all materials

**Bronze Sponsorship**
- 1 Quarter Page Ad
- 2 tickets to Seminar
- 2 tickets to Luncheon
- Preferred seating at Seminar
- Preferred seating at Sponsor Luncheon
- Logo/name recognition on all materials
- Recognition on all materials

**Individual Ticket**
- 1 ticket to Seminar
- 1 ticket to Luncheon
Commitment Form

Please select one:

- ☐ $5,000 Diamond Sponsor
- ☐ $3,500 Platinum Sponsor
- ☐ $2,000 Gold Sponsor
- ☐ $1,000 Silver Sponsor
- ☐ $500 Bronze Sponsor
- ☐ $75 Individual Ticket
- ☐ $50 Early Bird Ticket

Contact Information:

Name/Company: ____________________________
Contact Name: ____________________________
Address: __________________________________
City: ___________ State: _______ Zip Code: _______
Phone: __________________ Email: __________________

Payment Information:

Name as it appears on card: ____________________________
Card Number: ____________________________
Billing Address: ____________________________
City: ___________ State: _______ Zip Code: _______
Signature: ____________________________

Send completed form and payment to:
Archdiocese of Miami Development Corporation
9401 Biscayne Boulevard
Miami Shores, FL 33138
Attn: Legacy Planning Summit

Please make all checks payable to: Archdiocese of Miami
Ad Requirements

MECHANICAL REQUIREMENTS FOR ALL ADS
○ No bleed
○ All ads print in four-color process (CMYK).
○ Each ad will be bordered by a one-point black rule.

ELECTRONIC SUBMISSION FORMATS

PREFERRED FORMAT: High Resolution PDF, PDF x1a or TIFF. QuarkXpress or InDesign files must be converted to PDFs (“press quality” CMYK/300dpi, maximum quality, fonts fully embedded – not subsets).

OTHER ACCEPTABLE FORMATS: Photoshop TIFF (CMYK/300dpi, flattened to single layer), or Adobe Illustrator EPS (CMYK, all fonts converted to outlines and rasterized graphics embedded). We cannot be held responsible for color accuracy.

LOGOS: Adobe Illustrator EPS (all fonts converted to outlines and rasterized graphics embedded), Photoshop TIFF, JPEG (CMYK/300dpi) or High Resolution PDF.

NON-COMPLIANCE SIZE: If the ad is sized incorrectly, we reserve the right to resize and/or re-create it to fit accordingly.

FORMAT: We cannot use ads, images, and logos sent as Microsoft Word or Publisher files, web graphics, or low-res graphics (under 300dpi).

<table>
<thead>
<tr>
<th>Sponsorship Level</th>
<th>Page Size</th>
<th>Dimensions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Diamond Sponsor</td>
<td>2 Full Page Ads</td>
<td>8.5”W X 11”H</td>
</tr>
<tr>
<td>Platinum Sponsor</td>
<td>1 Full Page Ad</td>
<td>8.5”W X 11”H</td>
</tr>
<tr>
<td>Gold Sponsor</td>
<td>1 Half Page Ad</td>
<td>8.5”W X 5.5”H</td>
</tr>
<tr>
<td>Silver Sponsor</td>
<td>1 Half Page Ad</td>
<td>8.5”W X 5.5”H</td>
</tr>
<tr>
<td>Bronze Sponsor</td>
<td>1 Quarter Page Ad</td>
<td>4.25”W X 5.5”H</td>
</tr>
</tbody>
</table>

Submission Deadline: March 31, 2020
Submit Artwork to: spaunoel@theadom.org