

STEP SPONSORSHIP OPPORTUNITIES

The Society of Trust and Estates Practitioners (STEP) is a global organization of professionals who advise families on cross border matters relating to estate planning, taxation, matrimonial matters and personal finance.

The New York City branch of STEP has regular monthly meetings where current events are discussed, often with a formal presentation. CLE/CPE is offered to attendees. The New York branch of STEP currently has over 250 members. The programs are generally attended by between 40 and 60 professionals including attorneys, accountants, trust officers, bankers and financial planning professionals. Meetings are generally 1.5 hours in length and are held either during lunch hour or as an evening program with a networking reception following.

Platinum – Full Event Sponsor – *provides room, lunch/beverages (typical cost to Sponsor \$2,500-\$3,000)*

Advantages of Platinum Sponsorship:

- Attendance for up to 4 people from your organization to attend the meeting & to network
- Sponsor representative can make a brief presentation to introduce the organization & how it may be of interest to the STEP members
- Display signage in the meeting room
- Mailing of meeting notice with sponsor's name and email link to sponsor's website to all NY branch members
- Distribute marketing or promotional material to attendees

Gold – Room Sponsor – *provides the room*

Advantages of Gold Sponsorship:

- Attendance for up to 3 people from your organization to attend the meeting & to network
- Display signage in the meeting room
- Mailing of meeting notice with sponsor's name and email link to sponsor's website to all NY branch members
- Distribute marketing or promotional material to attendees

Silver – Lunch/Beverage Sponsor – *provides lunch/beverages (typical cost to Sponsor \$1,000 - \$2,000, depending on venue and event)*

Advantages of Silver Sponsorship:

- Attendance for up to 2 people from your organization to attend the meeting & to network
- Mailing of meeting notice with sponsor's name and email link to sponsor's website to all NY branch members
- Distribute marketing or promotional material to attendees

Bronze – “Recognition Sponsor” - \$1,000

Advantages of Bronze Sponsorship:

- Attendance for 1 person from your organization to attend the meeting & to network
- Distribute marketing or promotional material to attendees

For additional information on STEP sponsorship opportunities, please contact Glenn G. Fox, Vice Chairman of STEP N.Y., at (212) 626-4689 or by email at glenn.fox@bakermckenzie.com.