

The Dallas Foundation
23rd Annual Professional Advisor Seminar
Evolving Trends and Changing Laws:
Charting a path through today's tax and estate planning landscape



Friday, March 27, 2020

Belo Mansion

Breakfast – 7:30am | Seminar – 8:00am – 10:30am

Featuring: John J. Scroggin, J.D., LL.M, AEP (Distinguished), an expert on business, tax and estate planning

For 23 years, The Dallas Foundation's Professional Advisor Seminar has provided timely and relevant continuing education programs for accountants, investment managers, wealth advisors, financial planners, trust attorneys, and more. This year's Professional Advisor Seminar focuses on traps for advisors, unexpected planning opportunities, and how to counsel clients through specific legal changes. Advisors will leave the seminar with practical "value-added" checklists for clients.

**We invite your company to be a 2020 sponsor of
The Dallas Foundation's Annual Professional Advisor Seminar.
Please see the sponsor levels below.**



PRESENTING SPONSOR - BANK OF TEXAS

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As a major sponsor, your benefits include the following:

- Corporate signage as a major sponsor
- Logo recognition projected on screen during breakfast
- Special recognition on event invitations
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- Recognition on The Dallas Foundation's website
- Complimentary table with preferred seating for up to eight attendees
- Invitation for 4 to private reception with speaker on the evening of March 26th

TABLE SPONSOR - \$1,500

As a table sponsor, your benefits include the following:

- Table signage at event
- Logo recognition projected on screen during breakfast
- Recognition on The Dallas Foundation's website
- Complimentary table with preferred seating for up to eight attendees
- Invitation for 2 to private reception with speaker on the evening of March 26th

INDIVIDUAL TICKET - \$80

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REGISTRATION FORM

To register as an individual or to reserve your sponsor table, please visit www.dallasfoundation.org/PASeminar or mail in the form below. For questions, please contact Haley McCollum, Development and Marketing Associate, at (214) 694-2527 or hmccollum@dallasfoundation.org.

To pay via check, please complete the form below and mail with check to
"The Dallas Foundation, 3963 Maple Ave Ste 390, Dallas, TX 75219."

Names of Attendees:

Attendee Email Addresses:

- | | |
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| 1. _____ | _____ |
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| 3. _____ | _____ |
| 4. _____ | _____ |
| 5. _____ | _____ |
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| 7. _____ | _____ |
| 8. _____ | _____ |

Company _____ Key Contact Name _____

Address _____ City/State/Zip _____

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- Major Sponsor - \$5,000 (includes 8 tickets)
- Table Sponsor - \$1,500 (includes 8 tickets)
- Individual Ticket - \$80 each: _____ (number of tickets)