

2024 Professional Advisor Seminar



SPONSORSHIP OPPORTUNITIES

For over 25 years, The Dallas Foundation has hosted its annual Professional Advisor Seminar to provide timely and relevant content for accountants, investment managers, wealth advisors, financial planners, trust attorneys, and other professionals. The seminar is designed to offer up-to-date and pertinent information, as well as a chance for continuing education for qualified advisors.

We are excited to announce that our 2024 seminar will be led by **Susan R. Schoenfeld, JD, LL.M. (Taxation), CPA, MBA**, founder of Wealth Legacy Advisors LLC. Schoenfeld will discuss *The Influence of Affluence: Helping Your Clients Navigate Family Wealth Dynamics*, an enlightening discussion examining the underlying dynamics of wealth on the next generation and maintaining strong familial bonds and addressing concerns that keep high net worth individuals and their trusted advisors awake at night.

The Dallas Foundation invites your organization to be a 2024 sponsor of the Professional Advisor Seminar and partner with us to deliver this engaging conversation to our community of financial advisors.

Sponsorship Levels

BENEFITS	PRESENTING \$12,500	BENEFACTOR \$7,500	MAJOR \$5,000	TABLE \$2,500
Complimentary tickets to seminar	Includes 16 tickets	Includes 8 tickets	Includes 8 tickets	Includes 8 tickets
Speaking opportunity at the start of the seminar	■			
Advertisement opportunities*	Includes one (1) full page, color ad in event booklet & one (1) digital ad in <i>Giving Counsel</i>	Includes one (1) half page, color ad in event booklet	Includes one (1) one-fourth (1/4) page, color ad in event booklet	
Logo included on event materials including signage, print & digital ads, media releases, emails, and TDF's website**	■ <i>Logo hyperlinked where applicable.</i>	■ <i>Logo hyperlinked where applicable.</i>	■ <i>Logo hyperlinked where applicable.</i>	■ <i>Logo hyperlinked where applicable.</i>
Sponsor recognition	Includes individual presentation slide with logo & pre- and post-event recognition on social media	Includes individual presentation slide with logo & post-event recognition on social media	Includes grouped presentation slide with logos	Includes grouped presentation slide with logos

INDIVIDUAL TICKET: \$90

*For inclusion in event program, ad artwork must be submitted by January 12.

**For inclusion in digital materials, logo artwork must be submitted by December 1.

For questions, to reserve your sponsorship, or register as an individual, please contact Kevin Betancourt at kbetancourt@dallasfoundation.org.