

Estate Planning & Wealth Management Forum

QUEENS
UNIVERSITY CHARLOTTE

2026 SPONSORSHIP PACKET

EVENT OVERVIEW

The Estate Planning and Wealth Management Forum, formerly Estate Planners Day, presented by Queens University of Charlotte, is the premier estate planning conference of the Carolinas. This single-day, in-person conference offers a comprehensive educational program featuring nationally recognized experts, networking opportunities, sponsor booths, continuing education credits and more. The forum is the longest continually running public event in Queens' history.

ABOUT QUEENS

Queens University of Charlotte is located in one of America's fastest growing cities, offering an extended classroom to students and a direct pipeline to meaningful careers for graduates. On track to become the national private university of Charlotte, Queens University serves around 1,500 students in undergraduate and masters-level programs across the liberal arts and sciences as well as the professional fields of business, communication, nursing, health, and education. Queens' unique General Education model teaches students to think critically about some of the world's biggest problems, beyond the boundaries of what's expected in a college classroom.

48th Annual Estate Planners Day

Thursday, April 30, 2026

Networking & Breakfast: 7:15 AM

Conference: 8:00 AM – 5:00 PM

Reception & Raffle: 5:00 PM - 6:00 PM

Sarah Belk Gambrell Center for the Arts and Civic Engagement

Queens University of Charlotte

2319 Wellesley Avenue

Charlotte, NC 28207

2025 STATS

- 350+ attendees from 11 states & Washington, DC
- 150 companies and organizations represented
- Over 1,800 continuing education credit hours awarded

SPONSORSHIP CONTACT

Ariani Huguenin

Director of Memberships & Sponsorships

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PREMIER DINNER SPONSOR - \$7,500

- Host of Welcome Dinner with Queens University the evening before the conference
- Company recognition on the dinner invitation
- Speaking opportunity at dinner (approximately 5 minutes)
- Opportunity to invite guests to dinner (~25 seats)
- Opportunity to include promotional materials in gift bags (excluding notepads)
- Eight (8) complimentary in-person conference registrations

ALSO INCLUDES

- Tabletop exhibition space at conference (as available)
- List of conference attendees with contact information two weeks before and after event
- Opportunity to provide a raffle item for drawing during reception
- Podium recognition as Premier Dinner Sponsor
- Logo placement on presentation, day-of signage, program, digital platform and email campaigns
- Company recognition on conference website
- Company description in program

Tax Deductible Amount - \$4,620

PREMIER RECEPTION SPONSOR - \$6,000

- Exclusive host of post-conference reception
- Opportunity to provide branded décor for reception space
- Speaking opportunity (approximately 5 minutes) and opportunity to draw the raffle prizes during the reception
- Opportunity to include promotional materials in gift bags (excluding notepads)
- Six (6) complimentary in-person conference registrations

ALSO INCLUDES

- Tabletop exhibition space with priority placement at conference
- List of conference attendees with contact information two weeks before and after event
- Opportunity to provide a raffle item for drawing during reception
- Podium recognition as Premier Reception Sponsor
- Logo placement on conference website, presentation, day-of signage, program, digital platform and email campaigns
- Company description in program

Tax Deductible Amount - \$3,840

PREMIER CONFERENCE MATERIALS SPONSOR - \$5,500

- Logo placement on conference gift bags, notepads, pens and binders
- Opportunity to include promotional materials in gift bags (excluding notepads)
- Opportunity to include promotional materials in speaker greenrooms and backstage
- Five (5) complimentary in-person conference registrations

ALSO INCLUDES

- Tabletop exhibition space at conference (as available)
- List of conference attendees with contact information two weeks before and after event
- Opportunity to provide a raffle item for drawing during reception
- Podium recognition as Premier Conference Materials Sponsor
- Logo placement on presentation, day-of signage, program, digital platform and email campaigns
- Company recognition on conference website
- Company description in program

Tax Deductible Amount - \$3,700

PREMIER BREAKFAST//LUNCH//BREAKS SPONSOR - \$4,500 (3 Spots Available)

- Logo placement on corresponding table signage
- Speaking opportunity at podium during select time (1-2 minutes)
- Opportunity to include promotional materials in gift bags (excluding pens and notepads)
- Four (4) complimentary in-person conference registrations

ALSO INCLUDES

- Tabletop exhibition space at conference (as available)
- List of conference attendees with contact information two weeks before and after event
- Opportunity to provide a raffle item for drawing during reception
- Podium recognition as Premier Food & Beverage Sponsor
- Logo placement on presentation, day-of signage, program, digital platform and email campaigns
- Company recognition on conference website
- Company description in program

Tax Deductible Amount - \$2,700

PREMIER SESSION SPONSOR - \$4,500 (6 Spots Available)

- Opportunity to introduce session speaker of choice (1-2 minutes)
- Opportunity to include promotional materials in gift bags (excluding notepads)
- Four (4) complimentary in-person conference registrations

ALSO INCLUDES

- Tabletop exhibition space at conference (as available)
- List of conference attendees with contact information two weeks before and after event
- Opportunity to provide a raffle item for drawing during reception
- Podium recognition as Premier Session Sponsor
- Logo placement on presentation, day-of signage, program, digital platform and email campaigns
- Company recognition on conference website
- Company description in program

Tax Deductible Amount - \$2,700

GENERAL SPONSOR - \$3,500

- Tabletop exhibition space at conference (as available)
- List of conference attendees with contact information after event
- Opportunity to provide a raffle item for drawing during reception
- Logo placement on presentation, program and digital platform
- Company recognition on conference website, day-of signage and email campaigns
- Three (3) complimentary in-person conference registrations

Tax Deductible Amount - \$2,420

SUPPORTING SPONSOR - \$2,500

- List of conference attendees with contact information after event
- Logo placement on presentation, program and digital platform
- Company recognition on conference website, day-of signage and email campaigns
- Two (2) complimentary in-person conference registrations

Tax Deductible Amount - \$1,780