



Newport Beach



Huntington Beach



Orange



Brea

For more than two decades, IYME.org's acclaimed financial workshops have been a vital resource, supporting and educating seniors throughout Orange County.

SPONSORSHIP OPPORTUNITIES

Financial & Estate Literacy's flagship public workshops are each six weeks in length, 1 1/2 hours per week and designed to educate attendees about money management and estate planning while encouraging charitable planned giving. Currently, nine Orange County community senior centers and libraries offer the series geared to those 55-plus at no charge in the Spring and Fall annually.

IT'S YOUR MONEY! covers the business of money providing a detailed look at tax planning, financial planning, medical care planning, investments and equity & fixed income investing.

IT'S YOUR ESTATE! covers estate planning basics including living trusts, tax planning, retirement account planning, trustees and executors.

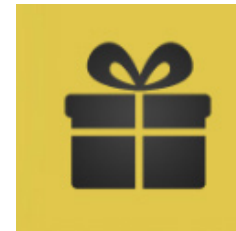
The award-winning workshops are appropriate for both experienced investors and novices, with a virtual Zoom webinar option available for those not able to attend in person.



EDUCATE

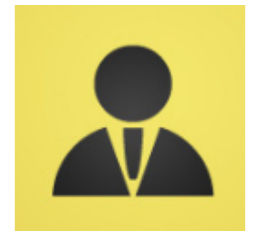
Why "It's Your..."?

Many people prematurely relinquish their financial and estate responsibility to others. We believe the longer you stay in control of your money and estate, the longer and happier you will live.



TAX-WISE GIVING

Our only bias is that we believe folks should consider charitable giving because our tax system encourages us to do so and giving tells the world about our personal values and interests.



CONNECT

Ask First!
We introduce you to the value of the "**ASK FIRST**" form that should be filled out by any financial planning professional you plan to engage.

*A core principle of IYME.org is to encourage **tax-wise charitable** giving that reflects one's core values.*



Fullerton



Laguna Niguel



Laguna Beach



Mission Viejo



Irvine

WHY PARTICIPATE?

- Your sponsorship provides a twice a year opportunity to invite your donor base to the workshops. We encourage making a soft ask to include your charity in this letter, or e-mail blast.
- Donor attendance at the workshop series allows for trust to develop, and for financial and estate concerns and opportunities to be addressed.
- We offer experts in charitable gift planning as an added no-cost serve to meet with prospective donors on your behalf.
- All workshop programs are conducted at community centers, senior centers, public libraries or other charitable organizations.
- Based on our evaluations 99% of attendees have recommended the workshop series to others and attend more than once.
- Sponsorship allows your charity to have a viable planned giving program for \$3,000 a year.

BENEFITS OF PARTNERSHIP

- Exposure for your organization throughout the county-wide, 2x yearly, 6-week series in 9 communities and online
- A turnkey planned giving and financial planning program, vetted by experts, to offer as as added benefit to your donors
- Exposure on the It's Your Money! and Estate! website, eblasts and enewsletters and on-site sponsorship signage at all 108 workshop sessions
- Opportunity to present in-person your charitable organizations mission and purpose live to an engaged audience
- Exposure in local press and PR promoting the workshops

ALIGNED VALUES: OUR SPONSORS SPEAK

"The It's Your Money! and Estate! Workshops are an invaluable resource for our donors or anyone looking to gain a deeper understanding of financial and estate planning. The workshops are well structured, free and are delivered by unbiased experts with no hidden agendas!"

~Elizabeth A. Kurila, CSPG, Senior Director, Gift Planning Strategies, Segerstrom Center for the Arts

"As a small non-profit, Blue Bell Foundation for Cats has limited resources for marketing to donors and people who need our services. Partnering with IYME.org has been win-win. Not only are we supporting their important work in the community, but we also have an opportunity to educate a receptive audience about estate planning for their pets and charitable contributions."

~Jenna Mikula, Director, The Blue Bell Foundation for Cats

WORKSHOP GUIDELINES

- Every charitable sponsor is allotted 3-5 minutes about the mission of the organization either before or concluding the sessions.
- Attendees are NOT solicited by charitable organizations.
- NO financial products are sold.
- NO financial presenter receives attendee names or contact information.
- Invited speakers must disclose their fees.

COUNTY-WIDE SPONSORSHIP

2 - SERIES 6- Weeks 9 Locations 108 Sessions
\$3,000/year

ONE-SEASON SPONSORSHIP

1 - SERIES 6- Weeks 9 Locations 54 Sessions
\$1,500/year

ONE LOCATION SPONSORSHIP

1 - SERIES 6- Weeks 1 Location 9 Sessions
\$500/year

Contact Patricia Collins for more information.
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