



STEP

Miami

2024

SUMMIT

**STEP MIAMI
LEGACY:**

Que sigue
la tradición.

Sponsorship Packages





2024
SUMMIT

This year, tradition meets innovation and legacy takes center stage.

Building on the success of previous years, we are thrilled to invite you to join us for two days of inspiration, connection, and exploration on October 24th and 25th at the esteemed Ritz Carlton, Key Biscayne. Founded in 2000, the STEP Miami Branch is one of the largest and most active in the Americas. Consistent with the objectives of STEP, the Miami branch provides practitioners with access to high-level trusts and estates resources for all its members.

As we embark on this journey together, we celebrate the enduring traditions that have shaped us and the innovative spirit that propels us forward. Over the course of two unforgettable days, we'll delve into the essence of legacy, exploring how it informs our present and inspires our future. Our program is designed to ignite your passion, spark new ideas, and foster meaningful connections.

The STEP Miami Summit offers a unique opportunity for organizations to showcase their brand, connect with industry professionals, and demonstrate their commitment to the community. Various sponsorship packages are available, providing exposure before, during, and after the event.

Meet the Board



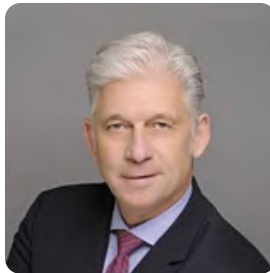
Madelayne Cordero
CHAIR | Chief Fiduciary
Officer and Head of Trust,
Amerant Bank



Anabella Murillo
VICE CHAIR | Managing
Director, Private Wealth,
IQ EQ Trust Company



Art Dichter
Director of International Tax
Services, Berkowitz Pollack
Brant Advisors + CPAs



Diego Polenghi
Vice President,
PNC Bank



Jennifer Wioncek
Head of the Tax & Private
Wealth Practice,
Bilzin Sumberg



John Harris
Managing Director &
Chief Wealth Advisor,
Coral Gables Trust



John Lenahan
Vice President, Private
Wealth Management,
Bernstein



Maria Toledo
Partner, Tax Services Advisory
Group - International Tax,
Kaufman Rossin



Megan Campos
Partner, Grant, Herrmann,
Schwartz & Klinger LLP



Oscar Guerra
Head of Wealth Planning
(Americas), EFG Capital
International



Patricia Carral
Wealth Planner/Director,
CitiTrust



Rahul Ranadive
Shareholder,
Carlton Fields



Ricardo Souto
Partner in the Miami office,
Shutts & Bowen LLP

The Event



Our program is designed to inspire fresh perspectives, and cultivate impactful relationships.

On the first day, join us for a vibrant welcome party where you'll connect with fellow attendees, share stories, and set the stage for the transformative conversations to come. Then, on the main Summit day, immerse yourself in a dynamic lineup of sessions led by industry pioneers and thought leaders.

Together, let's honor the legacy of the past as we chart a course for the future. Join us in embracing tradition, igniting innovation, and shaping the legacy of tomorrow.

Event Highlight

Over 400 attendees at the 2023 Annual Summit

Gorgeous beachfront location

High-quality program featuring top-tier speakers

Thought-provoking Keynote session

Exclusive networking opportunities

Unparalleled experience



PLATINUM SPONSOR

EXCLUSIVE

Committed

INCLUDES:

Company's logo included on all the name tags to be used by the participants (STEP Miami's logo will also be included on the name tags);

Brief opportunity (up to 15 minutes) to welcome the guests at the opening of the Summit;

Four (4) all-access delegate passes and one (1) sponsor table delegate pass with limited access;

Display table in designated sponsor area on Summit Day, October 25, 2024. First choice of table location (table size: 6 ft with 2 chairs). Promotional material may only be placed at designated display table;

Inclusion of logo on all invitations and conference materials;

List of Summit participants who opt in to share their contact information - name and email address. This list is sent out to the sponsors a week after the Summit;

Company's logo, description, contact info and link to company website on stepmiamisummit.com;

Video exposure - booth with 1st priority placement.
Custom video presence on social media.

DIAMOND SPONSOR

EXCLUSIVE

\$ 32,000

WELCOME PARTY EXCLUSIVE SPONSOR

On Thursday, October 24, sponsor has the opportunity to speak (up to 15 minutes) about your business. Specific mention of sponsor by STEP Miami Chair at the October 25 Summit Opening Remarks;

A sign with company's logo will be placed near sponsor's exclusive display table (promotional materials allowed on table only);

There will be a 360 Photo booth available for guests; Company's logo along with STEP Miami's logo will be present on the digital photos;

Sponsor may invite up to 10 additional guests to the cocktail party. Note, names of guests must be provided to STEP Miami by Wednesday, October 16. Additional guests will have separate name tags and will not be allowed to enter the Summit on Friday unless they are registered and paid;

Summit Day - Friday, October 25, 2024: sponsor will have three (3) all-access delegate passes and one (1) sponsor table delegate pass with limited access; a display table in designated sponsor area. Promotional material may only be placed at designated display table. Second choice of table location (table size: 6 ft with 2 chairs);

Inclusion of logo on all invitations and conference materials;

List of Summit participants who opt in to share their contact information - name and email address. Will be sent out to the sponsors a week after the Summit;

Company's logo, description, contact info and link to company website on stepmiamisummit.com;

Video exposure - booth with 1st priority placement.
Custom video presence on social media.

RUBY SPONSOR

NON-EXCLUSIVE

\$ 10,000

INCLUDES:

Option to speak/provide company message for 3 minutes on looping reel;

Special mention by Chair during event;

Booth located closest to general session;

List of Summit participants who opt in to share their contact information - name and email address. Will be sent out to the sponsors a week after the Summit;

Custom video presence on social media.

EMERALD SPONSOR

NON-EXCLUSIVE

\$ 7,000

INCLUDES:

Option to speak/provide company message for 3 minutes on looping reel;

Booth in Main Ballroom foyer;

List of Summit participants who opt in to share their contact information - name and email address. Will be sent out to the sponsors a week after the Summit;

Custom video presence on social media.

SAPPHIRE SPONSOR

NON-EXCLUSIVE

\$ 5,000

INCLUDES:

Logo/static message on own page with video loop;

Booth in exhibit area ballroom just off main foyer;

List of Summit participants who opt in to share their contact information - name and email address. Will be sent out to the sponsors a week after the Summit;

Static post on social media.

OPAL SPONSOR

NON-EXCLUSIVE

\$ 3,000

INCLUDES:

Logo on shared page on video screen that will stay up for 1 minute during the loop;

Booth in exhibit area closer to reception and further away from general session;

List of Summit participants who opt in to share their contact information - name and email address. Will be sent out to the sponsors a week after the Summit;

Pre-designed social media post.

TURQUOISE SPONSOR

NON-EXCLUSIVE

\$ 2,000

INCLUDES:

Logo on shared page on video screen that will stay up 30 seconds;

No booth;

List of Summit participants who opt in to share their contact information - name and email address. Will be sent out to the sponsors a week after the Summit;

Pre-designed social media post.



STEP

Miami

For more information about sponsorship opportunities and to discuss how your organization can get involved, please contact:

Website stepmiamisummit.com

Email STEP.Miami@step.org

Thank you!

