

Exclusive Strategic Partnerships: Policy and Taxation Group (PATG)



A SPECIAL INVITATION

Become a Strategic Partner and Policy and Taxation Group, The Voice for Family Offices and the Financially Successful, with a Focus Exclusively on the Critical Tax and Economic Policies.

WHAT YOU GET AS A STRATEGIC PARTNER

Annual Washington DC Supporters Event: Full Day event with Board Members, Supporters, Political Insiders, and Leadership, including dinner.

Access to Regional Events: Attendance to meetings and connection to all attendees at over 25 Regional events around the country, including family offices, successful individuals, and Board Members.

Congressional Family Business Caucus: 3 Meetings a year in DC, connection to family business owners, family offices, Board Members, legislative insiders, and Members of Congress.

Private Company Directors: Full-day meeting in Washington, DC with Private Company Directors, and Members of Congress.

Family Business Centers Executive Directors: Attendance to meeting, dinner, and connection to Executive Directors of Family Business Centers around the country and Private Directors of family businesses.

Quarterly Update Calls: Calls with policy experts, Members of Congress, Washington, DC insiders, legislative news.

Other Benefits Include:

One-Hour Webcast: Company-specific one-hour video webcast hosted by PATG, distributed to PATG database, social media, media release, and posted on websites.

Logo/Website Link: Your company's logo and description listed on PATG website as Strategic Sponsor.

Logo On Emails: Partner logo featured on all weekly emails sent to members and business database (45,000+).

Strategic Partner Advertorial Email: Email with short company message and link to Strategic Partner website/social media; Distributed via PATG email blast to full 45,000+ database.

Strategic Partner White Paper: Post/promote strategic partner White Paper on family office or relevant financial issues. Posted on PATG website and disseminated to 45,000+ email database.

Insider Information: Regular Email & Quarterly Zoom Meeting Updates; Receive regular PATG email updates on legislative issues important to successful families and family offices.

*For more information, please email John Gugliada, Director of Engagement,
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**Exclusive Strategic Partnership Fee: \$25,000 per 12-month period.
Customized strategic partnerships also available upon request.**

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