



ADVISOR SUMMIT

Mastering Asset Utilization- The Art of Tax
and Holistic Planning with S Corps, Real
Estate, and Beyond

Sponsorship Opportunities

September 9, 2025
7:30 to 11:30 a.m.
Arizona Country Club



Phoenix Children's®
Foundation

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Overview

Phoenix Children's is thrilled to unveil our 2025 Summit: "Mastering Asset Utilization- The Art of Tax and Holistic Planning with S Corps, Real Estate, and Beyond." Designed to meet the continuing education needs of financial, legal, and philanthropic professionals, this summit aims to cover how to maximize your clients' deductions through untapped assets such as real estate, agricultural assets, privately held C corporations, S corporations, LLCs, limited partnerships, and other unique opportunities. We're pleased to offer corporate sponsorship opportunities for this event, providing companies with a platform to showcase their commitment to professional development and philanthropic advancement to 100+ individuals in attendance.

By supporting this summit, sponsors can align their brand with a gathering focused on exploring opportunities in philanthropic tax optimization, essential for professionals navigating the complexities of estate and gift tax planning.



Your sponsorship not only demonstrates your dedication to empowering industry professionals but also provides valuable exposure to a targeted audience seeking to maximize opportunities amidst continuing legislative and landscape shifts. Join us in making a meaningful impact on the professional development landscape while positioning your organization as a leader in supporting Phoenix Children's.

2025 Summit Keynote Speaker



Bryan Clontz, PhD, CFP®, CLU®, ChFC®, CAP®, AEP®, RICP®, CBP, ChSNC®
President & Founder, Charitable Solutions, LLC

Bryan Clontz is the founder and president of Charitable Solutions, LLC, specializing in non-cash asset receipt and liquidation, gift annuity reinsurance brokerage, actuarial gift annuity risk management consulting, emergency assistance funds, as well as virtual currency and life insurance appraisals/audits. He also serves as Senior Partner of Ekstrom Alley Clontz & Associates – a community foundation consulting firm in Tuscon, AZ.

Bryan is the founder of the Dechomai Foundation, Inc. and the Dechomai Asset Trust – two national donor advised funds focusing on non-cash assets generally and S-corp transactions, respectively. He is also the founder and president of The Emergency Assistance Foundation, Inc.– a global charity that allows employers to create emergency assistance and disaster relief funds for their employees. He also created the National Gift Annuity Foundation, the largest national independent gift annuity platform.

To learn more about Bryan, please visit GiveToPCH.org/summit

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	Title \$15K	Platinum \$10K	Speaker \$7.5K	Mission \$5K	Breakfast \$1.5K	Program \$500
PRESENTATION AND PARTICIPATION						
Event tickets	12	10	8	6	4	2
Opportunity for a five-minute presentation at event and a reserved table	•					
Opportunity for a two-minute presentation at event and a reserved table		•	•			
Opportunity to provide giveaway for participant takeaways	•	•				
PUBLISHING						
One-page thought leadership article based on summit topic included in the event program and shared as an article and post on our LinkedIn profile	•					
Corporate display opportunity at the event, including a high traffic space for your company to have marketing materials and staff present, highlighting your organization's services	•					
Opportunity to attend our next "Behind the Red Line" event for two participants	•					
Opportunity to attend our private Innovation Circle Fall Power Pitch event for two participants	•	•	•			
Inclusion in social media posts for event	•	•	•	•	•	
ADVERTISING						
Two-page advertisement in event program	•					
Full page advertisement in event program		•				
Half page advertisement in event program			•	•		
Quarter page advertisement in event program					•	•
Name or logo listed on print and digital event invitation	•	•	•			
Name or logo listed on event emails	•	•	•	•		
Name or logo listed on event website with link to your company website	•	•	•	•	•	
Name or logo on event signage	•	•	•	•	•	•
Brand affiliation and partnership activation rights with Phoenix Children's	•	•	•	•		



For more information, contact [Nicola Lawrence](#), associate vice president of philanthropic advising, at [602-933-3870](tel:602-933-3870) or giftplanning@phoenixchildrens.com.

A Partnership with Purpose

Over the past 40 years, Phoenix Children's has become a trusted national brand, synonymous with pediatric excellence. More than 50% of the children we care for come to us with no private health coverage. Thanks to philanthropy, we accept all patients, regardless of their ability to pay. Your sponsorship helps us care for the most vulnerable and fulfill our mission to provide hope, healing and the best healthcare for children and their families.

Sponsoring this Phoenix Children's event allows you to:

- Showcase your brand to an audience of over 1,000 individual wealth advisors, attorneys, financial planners, lawyers, and other nonprofit individuals throughout Arizona and the Southwest
- Offer insights to thought leaders in wealth management and philanthropic tax optimization
- Provide timely access to the impact of current and proposed tax legislation on your clients, and the solutions philanthropic strategies can provide



2023 by the numbers

247k+
patients treated

62k+
urgent care visits

2.4k+
trauma cases

403k+
outpatient visits

25k+
surgical cases

8
centers of excellence

107k+
emergency visits

4 Arrowhead
Avondale
Thomas
East Valley
campuses

4 Glendale
Mesa (2 locations)
Scottsdale
urgent care centers

2.7m
dollars per day to operate
the health system

75+
pediatric
subspecialties

170+
philanthropically
funded programs