



Together as the Association of International
Certified Professional Accountants

2023

Sponsorship opportunities

Personal Financial Planning Summit

Jan. 30–Feb. 1, 2023

Hotel Omni Barton Creek Resort & Spa
Austin, TX

Meeting location:

Palisades West Building, DFA Headquarters

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About the event

Your opportunity to cultivate relationships with leading advisors in tax, estate, retirement, investment and risk management.

We create the experience. You make it your own.

There's no other event like the AICPA Personal Financial Planning Summit:

- You're immersed in sessions that shed the format of a typical conference
- You'll join a circle of passionate, driven leaders working together to set the tone for the personal financial planning community
- You're challenged to apply your expertise to concepts and connect the dots between thoughtful insights and inspired solutions

Attendee demographics

Business category



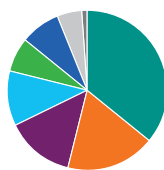
- Business and industry 42%
- Consulting firm 45%
- Public accounting 13%

Firm size



- 1 employee 17%
- 2-5 employees 18%
- 6-10 employees 22%
- 11-20 employees 13%
- 21-99 employees 13%
- 100+ employees 17%

Position



- Partner 36%
- Director/Manager 18%
- Sole practitioner 14%
- President/COO 11%
- CEO/CAO 7%
- Shareholder/owner 8%
- CFO 5%
- Staff 1%

87%

of attendees reported they will attend again

53%

of attendees have more than 20 years experience in PFP/wealth management

79%

of attendees' main focus is to grow their practice

Become a Summit sponsor

Be seen as a leader in the industry as one of our sponsors at **AICPA's Personal Financial Planning Summit**, an intensive, one-of-a-kind event developed for experienced financial planning professionals. Being a summit sponsor will give you direct access to firm leaders and decision-makers!

Connect with prominent financial planners, including CPAs, PFP Section members, PFS credential holders, CFPs, CFAs and other leading practitioners from investment advisory and wealth management firms. This invaluable time spent face-to-face with existing – and potential – clients is unparalleled at this event.

Who you'll see ...

(Example of past companies who've attended)

- Abacus Planning Group
- Ameriprise Financial
- Buckingham Strategic Wealth
- Clarfield Financial Advisors
- CliftonLarsonAllen
- CPS Investment Advisors
- DHG Wealth Advisors
- Dimensional Fund Advisors
- Fifth Third Private Bank
- FS Investments
- JFS Wealth Advisors
- Key Financial
- LourdMurray
- Modera Wealth Management
- Moneta
- Moss Adams Wealth Advisors
- Pershing Advisor Solutions
- Pinnacle Advisory Group
- RSM
- Signature Family Wealth Advisors
- SK Wealth Management
- SVA Plumb Financial
- The Kelly Group
- Truepoint Wealth Counsel

All items are subject to change.

Sponsorship opportunities

Sponsorships increase your ROI and build brand recognition in a competitive marketplace. The following sponsorships were designed to stretch your marketing budget and help your business stand out as an industry leader.

Exclusive

\$10,000

Activity sponsor

- Tuesday evening off-site attendee dinner
- Prominent signage
- Logo printed on napkins
- Two (2) all-access badges

Exclusive

\$8,000

Reception sponsor

- Monday networking reception at host hotel for Summit attendees
- Logo printed on napkins placed on food and beverage stations
- Specialty drink
- Sponsor recognition throughout reception
- Table with corporate materials may be set up during reception
- One (1) all-access badge

\$5,000 per day

Transportation sponsor

- Your logo displayed on bus transportation taking attendees to and from the conference site
- One (1) seat drop of corporate materials
- Bottled water given to each attendee
- One (1) all-access badge

Exclusive

\$4,000

Lanyard sponsor

- Logo displayed on AICPA-provided lanyards
- One (1) all-access badge

\$2,000

Room drop sponsor

- Sponsor-provided gift placed in all attendee rooms on first day of event
- One (1) all-access badge

All items are subject to change.

Ready to get started?
Have questions?
Other sponsorship ideas?

Email us today!
SPEXevents@hq.cpa.com

[Start here →](#)



Founded by AICPA and CIMA, the Association of International Certified Professional Accountants powers leaders in accounting and finance around the globe.

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