



AICPA® & CIMA®

Together as the Association of International
Certified Professional Accountants

2024

Sponsorship opportunities

Personal Financial Planning Summit

Jan. 15–18, 2024

Hotel Van Zandt
Austin, TX

Meeting location:

Palisades West Building, DFA Headquarters

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

\$12,000

Activity sponsor

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

Exclusive

\$8,000

Reception sponsor

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

\$6,000 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

\$5,000

Lanyard sponsor

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

Exclusive

\$4,000

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.

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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